Child Check In User Manual

rollcall

v 9.5

Local: (706) 864-4055
Atlanta: (404) 551-4230
Toll Free: (866) 475-1699
www.CAAministries.org

C.A.A. MINISTRIES
Church Administration Assistance

By THE Book

Table of Contents

CHILD Check-in OVERVIEW

What is “child check-in”? 5

What are my options for checking students in? 5

Bar Code Badge 5

Key Tag ....□ 6

Name, Family Number or Badge Number 6

Bar Code Roster 7

Finger Print 7

What happens after the student checks in? 7

Attendance is recorded 7

Labels can be printed 7

What needs to be set-up before I use child check-in? 8

INSTALLING ROLL CALL for CHILD CHECK-IN

What software/hardware is required for child check-in? 13

Roll Call workstations 13

Bar Code scanner .. 13

Dymo LabelWriter 13

Finger Print Scanner 13

Finger Print Software 13

How do I install Roll Call software on my workstation? 13

From the CD 13

From the download file 13

How do I install Roll Call software on my network? 14

Installing the Server 14

Installing the Client 14

How do I configure the check-in station hardware? 15

Bar Code Scanner 15

Dymo Labelwriter 15

Finger Print Scanner 16

CONFIGURING ROLL CALL FOR Check-in

Where do I enter my church information? 17

Setup Assistant 17

Main Menu 17

How do I set up Roll Call security? 18

Setup Assistant 18

Main Menu 19

How do I create “check-in” users? 20

Setup Assistant 20

Main Menu 21

How do I set up my label options? 21

Setup Assistant 21

Main Menu 23

How do I set my “check-in” preferences? 24

Setup Assistant 24

Main Menu 24

Can I display my church’s logo on the main screen? 25

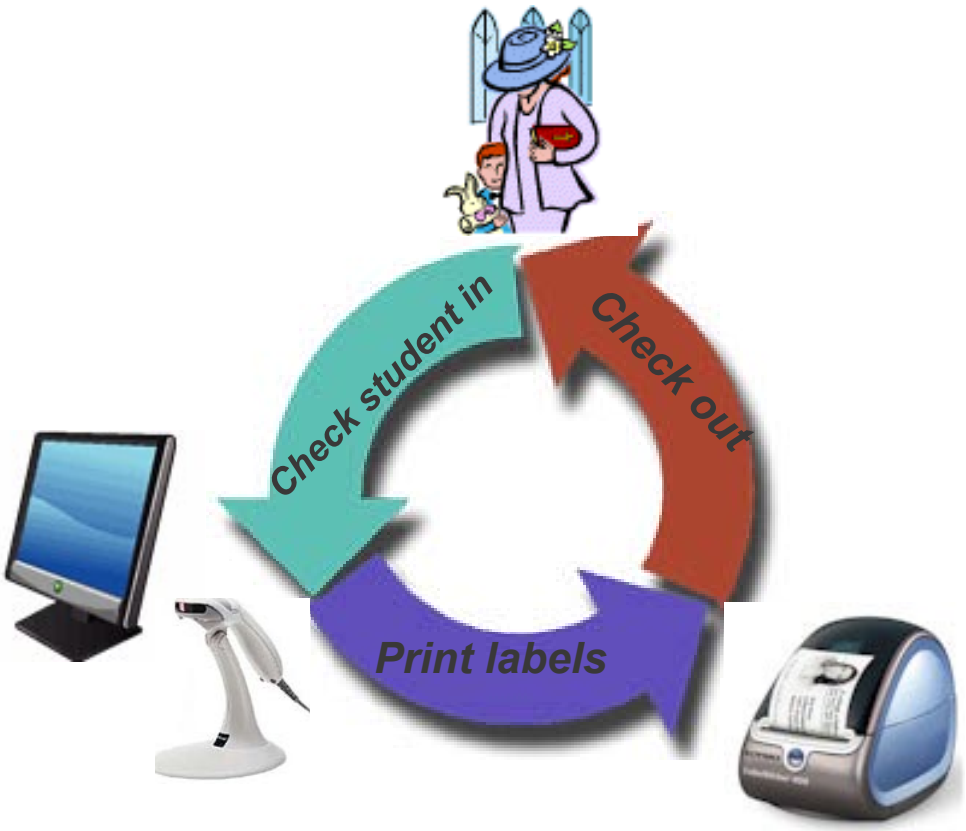
CREATING NEW GROUPS
What is a group? 27
What needs to be set up before creating new groups? 27
Group type 27
How do I create a group? 28
Enter general information 28
Add Members 29
Set Preferences 30
Can I add people into the database from the group members area? 31
ENTERING FAMILIES
What preferences can I use to speed up data entry? 33
Optional Mailing Name 33
Assign Family Numbers 33
Family Position Changes 34
Multiple Campus 34
Default Church Address 34
How do I enter a family? 34
Enter the Head of Family 34
Enter Other Members of the Same Family 36
How do I enter cell, work or other individual phone numbers? 37
Find the person's record 37
Enter work, cell, pager and fax numbers. 37
What comment fields are available? 38
General Comments 38
Special Needs 38
How do I import pictures into Roll Call? 38
Import individual picture 39
Import family picture 39
Picture tips and hints 39
Can I enroll students in a class or group from the people screen? 39
How do I assign family numbers? 40
People Screen 40
Assign Automatically 40
How do I assign badge numbers? 41
People Screen 41
Assign Automatically 41
USING BAR CODES
What needs to be configured to use bar codes? 45
Windows ☐ 45
Mac .....☐ 45
What are my options for checking students in with a bar code? 45
Bar Code Badge 45
Key Tag ..☐ 45
Bar Code Roster 45
How do I create the bar code badge? 45
What needs to be set-up to use key chain tags? 47
Order tags from a printer 47
Preferences 47

Assign key tag numbers to individuals 47
Assign key tag numbers to a family 47
How do I create a bar code roster? 48
OPERATING THE Check-in STATIONS
How do I log onto the check-in stations? 49
How do I check in a family using a last name, family number or badge number? 50
How do I check a family in using a bar code? 52
How do I check in an individual using a last name or badge no? 53
How do I check in an individual using a bar code? 55
How do I check in a student to a different class? 55
Can I record check-out times for students? 57
USING FINGERPRINTS
What needs to be configured to use fingerprint technology? 58
How do I set up the fingerprint software so it works with Roll Call? 58
How do I connect a person's finger print with Roll Call? 59
Once a person's fingerprint is recorded, how do I check them in? 61
CREATING ATTENDANCE REPORTS
How do I run Group Attendance reports? 64
There are two ways to access the group attendance reports. 64
How can you tell who has been absent or present for X weeks? 65
Can I see the attendance stats for each group/class in a department? 67
Can I see the attendance stats for groups for a quarter? 67
Can I view attendance for a group by week? 68
Can I view attendance information by the specific session? 70
Can I see the people that attended group/class in a date range? 71
Can I view a chart of a group's attendance for the last quarter? 73
Can I view a chart of a department attendance the last quarter? 73

CHILD CHECK IN OVERVIEW

What is “child check-in”?

The child check-in system in Roll Call allows you to check students into their classes, record attendance and print name tags and security labels. This system can be used to check people into classes, events, activities or any group that is defined in Roll Call.



What are my options for checking students in?

Bar Code Badge

One option for checking in children is the bar code badge. These badges are produced using Roll Call. The badges are printed 8 per page. They can be printed on card stock paper, then laminated or placed in name tag holders. The badges are printed with a bar code which identifies the student. They can also include your church logo, the student’s picture, family number or badge number, allergy information and the parent’s names.

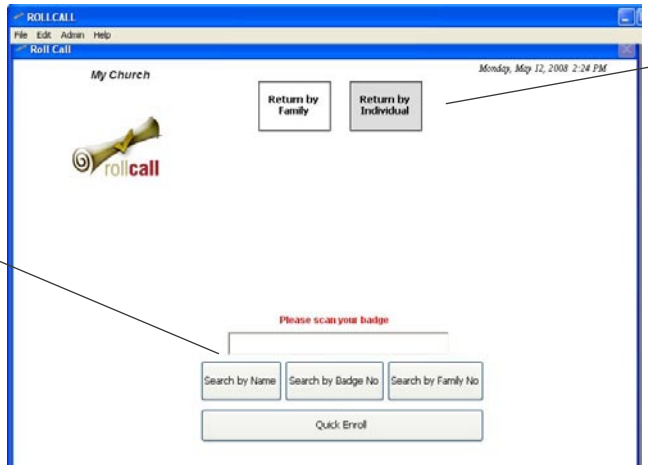
Key Tag

Another option is to have key chain tags printed with a bar code to identify the student or family.

Name, Family Number or Badge Number

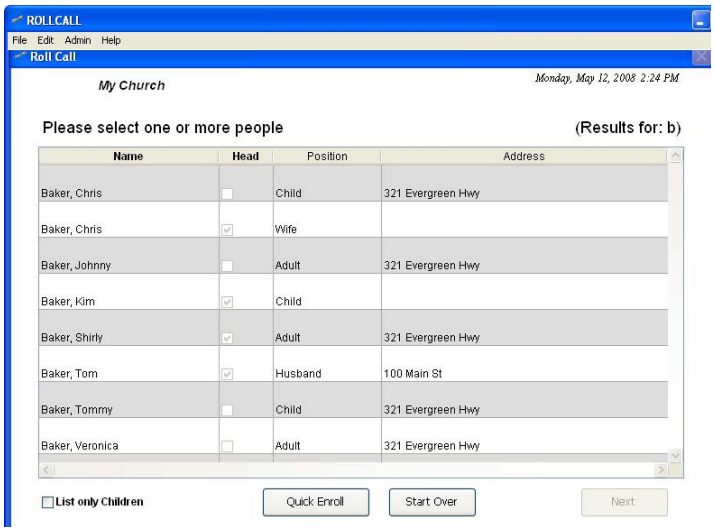
Another method for checking students in is by using their name. The person manning the check-in area simply types the last name, family number or badge number then selects the student from the list.

To check in by name, enter the last name (or portion of last name) then click SEARCH BY NAME



NOTE the toggle to return individuals or all family members.

Highlight one or more students to check in



Bar Code Roster

Another possible method for checking students in is by bar code roster. Instead of

Scan the students bar code from the roster

swiping a badge or entering a name, the person manning the check-in station can find the students name on the roster and scan it.

Have student place his finger on the scanner.

Finger Print

Having the student place their finger on a scan device is another option for identifying the student.

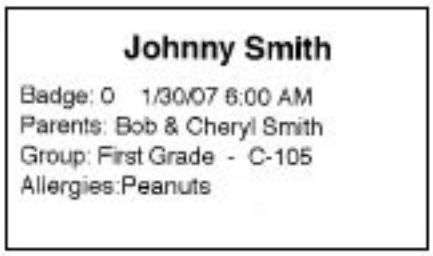
What happens after the student checks in?

Attendance is recorded

Once the child is checked into his class, Roll Call automatically records his attendance. Roll Call records the date and time he checked in.

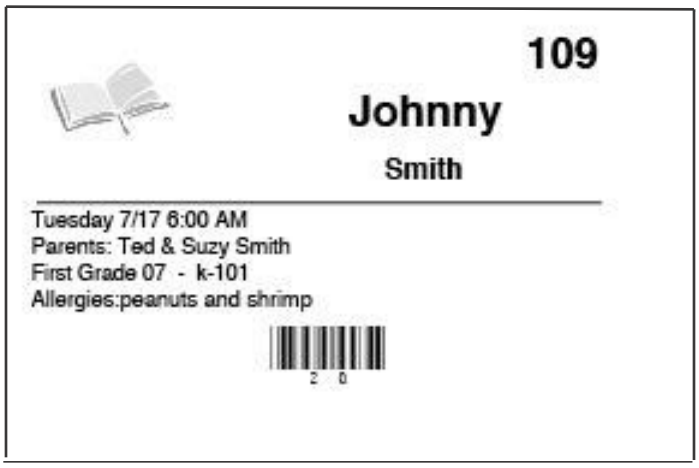
Labels can be printed

For every group or class that you define in Roll Call, you can set a preference for labels.



You can choose to print 1 to 5 labels, or not to print labels at all. If the student was just checked into a class that has a preference set to print labels, the labels will be printed.

There are two different size labels that can be used. The first is a smaller label (30334)



Your church can also opt to use the larger 30256 label. This option gives you more flexibility as to the information included on the label. Your logo can also be printed on this label.

What needs to be set-up before I use child check-in?

The table below outlines the steps that must be completed before you can use the children's check-in functionality. Each item is described in more detail in the chapters to follow.

Item	Description	Where Found
Install Roll Call software	Download the installer files from www.CAAministries.org or use the CD to install the software	
Enter church information	Enter your church name and address information	This can be entered using the Set Up Assistant when you first start using Roll Call. You can also enter this information by select Admin>Church Constants from the main Roll Call menu.

Initialize the Roll Call security system	There are two user names that come standard with Roll Call. They are Administrator and Director. Once you assign a password to the Director user, the security system in Roll Call is activated.	You can enter a password for Director and Administrator in the Set Up Assistant when you first start using Roll Call. You can also enter these passwords by selecting Admin>Edit Access from the main menu. Double click on the user name, then enter the passwords in the Edit User window.
Create check-in users	When you log into Roll Call with a "check-in" user name, the check-in screen is displayed.	You can enter user names for your check-in users in the Set Up Assistant that is presented when you first start using Roll Call. Enter the user name, then check the appropriate security group for that user. The "Automated" group is meant for "unmanned" check-in stations. This security group does not allow the quick enroll for visitors. The "Manual" group will allow check-ins for visitors
Choose a label size	You can print name tags and security labels for two different label stocks. The larger label is the 30256 shipping label. The smaller label is the 30334 Misc size label.	You can select your label stock in the Set Up Assistant that is presented when you first start using Roll Call. You may also set your label preference by selecting Admin>Preferences from the main menu. Then click on the Attendance tab. Next click on the LABEL PREFERENCES button.
Set check-in preferences	These preferences include the amount of time before and after a class starts that check-ins are allowed; what is included on a badge; and if the CONFIRM button is required for check-ins.	You can set your check-in preferences in the Set Up Assistant, which is presented when you first start using Roll Call. You may also set these preferences from Admin>Preferences. Then click on the Attendance tab.

Import logo	If you would like your church logo or picture to be displayed on the main Roll Call page, import the image file into Roll Call.	You can import your logo from the Set Up Assistant, which is presented when you first start using Roll Call. You can also click on the church name in the upper left corner of the main Roll Call page. A file dialog box will be displayed. Navigate to the image file and click OK.
Set up your groups/ classes in Roll Call	People can only be checked into groups that are in the database. Make sure your groups are set to meet on a weekly basis and that they have session days and times. Make sure to indicate for this group if labels should be printed when a student checks in.	From the main Roll Call screen, select Groups>Add Group.
Enter the people information into Roll Call.	At a minimum, you'll need to enter people's names and association (how they are involved in your church) into Roll Call. You can also enter contact information, note any allergy or special needs and import family and individual pictures.	From the main Roll Call screen, select People>Enter New People. This can also be accomplished through the Groups screen. In the members tab, click on the ADD button. Enter the last name of a student to enroll in this class. If Roll Call does not find anyone in the database with that last name, you'll be prompted to add this person.
Assign badge numbers	If you'll be using pre-printed badges to check children in or using badge number on name tag labels for security purposes, you'll need to assign badge numbers to the students in your database.	If you'd like Roll Call to automatically assign badge numbers to a set of people, select People>Assign Badge Number. Use the query editor to find your set of people. Next enter the starting number. Click OK and the numbers will be assigned.
Print badges	If you'll be using bar code badges to check students in, you'll need to print these badges beforehand.	From the main Roll Call screen, select Reports>Print Badges.

Assign bar code id's	If you'll be using pre-printed key chain tags, you'll need to assign each individual, the bar code identifier from his tag.	From the main Roll Call screen, select People>Assign Barcodes. Query the set of people you'd like to assign a bar code ID to, then scan the key tag that will be given to the student.
Configure hardware	Set up your Roll Call client computer stations in the check-in area of your church. These workstations must have network access to the Roll Call Server software. If you are only using one check-in station, you can set up Roll Call Standalone. Next plug in your bar code scanner, finger print scanner and label writer printers as appropriate.	

.

INSTALLING ROLL CALL for CHILD CHECK-IN

What software/hardware is required for child check-in?

Roll Call workstations

If you will only be using one check-in station, you'll want to install Roll Call Standalone. If you will be using multiple check-in stations, each "kiosk" needs to have a computer with Roll Call Client. That computer must have a network connection so that it can connect to Roll Call Server.

Bar Code scanner

If you will be checking students in using bar code technology, each check-in station will need a bar code scanner. The scanner needs to be a keyboard wedge device with the ability to scan a single digit. We recommend the Voyager CG hand held scanner.

Dymo LabelWriter

This printer is required if you wish to print labels for the child and parent upon check-in. The program is expecting a Dymo LabelWriter 400 or 400 Turbo printer. You may choose from 2 different label sizes, the 30256 shipping label or the 30334 multi-purpose labels.

Finger Print Scanner

If you will be checking students in using biometrics, you'll need the M2 Hampster finger print scanner from M2SYS connected to a Windows version of Roll Call Client.

Finger Print Software

If you'll be checking students in using their fingerprint, you'll need the finger print client and server software from M2SYS installed on your Windows machine.

How do I install Roll Call software on my workstation?

The single user version of Roll Call allows one user, on one computer to access Roll Call. For the single user installation, use the following instructions.

From the CD

To install Roll Call from the CD, simply place the CD in your CD drive. There will be three Roll Call files: 1)Roll Call 2)Roll Call Client and 3)Roll Call Server. Double click on the Roll Call file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

Once the installation is complete, you will have a Roll Call icon on your desktop. To use Roll Call, double click on that icon. The first time you use Roll Call, the Setup Assistant will be displayed. You may enter this information now, or press CANCEL to enter it later. Next you'll need to enter your license number. Select File>Enter License from the main menu. Enter the license number supplied on your invoice and press the tab key. The number of users and people records allowed will be displayed. Restart Roll Call and you'll be ready to begin.

From the download file

To install Roll Call from the downloaded file, double click on the Roll Call installer file you downloaded. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

Once the installation is complete, you will have a Roll Call icon on your desktop. To use Roll Call, double click on that icon. The first time you use Roll Call, the Setup assistant will be displayed. You may enter this information now, or press CANCEL to enter it later. Next you'll need to enter your license number. Select File>Enter License from the main menu. Enter the license number supplied on your invoice and press the tab key. The number of users and people records allowed will be displayed. Restart Roll Call and you'll be ready to begin.

How do I install Roll Call software on my network?

A network installation of Roll Call allows multiple people to access the data. If you have a multi-user license, multiple users can access the data simultaneously. For example, if you have purchased a 3 user license, 3 users may access the database at the same time. If you have purchased a single user license, you may still install the network version, but only one person may access the data at a time.

First you must decide which computer will house the database. That computer will be your server. The computer you choose as your server should not be used for many other applications. For example, if your secretary's computer is used for creating the bulletin, writing letters and accounting, you probably wouldn't want her computer to be your Roll Call Server. Since the server needs to be running at all times, it would slow down her other work.

Next decide who will need to use Roll Call. Each of those users will need Roll Call Client installed on their computer.

Installing the Server

To install Roll Call Server from the CD, simply place the CD in your CD drive. There will be three Roll Call files: 1)Roll Call 2)Roll Call Client and 3)Roll Call Server. Double click on the Roll Call Server file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

To install Roll Call Server from the downloaded file, double click on the Roll Call Server installation file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

Once the installation is complete, there will be a Roll Call Server icon on the desktop. To start Roll Call Server, double click on the icon. An open file dialog box will be displayed, asking you to select your data file or to create a new one. For new installations, click NEW, then enter the name you wish for your data file, then click SAVE. The Roll Call Server window will be displayed. For users to work in Roll Call the Server must be running.

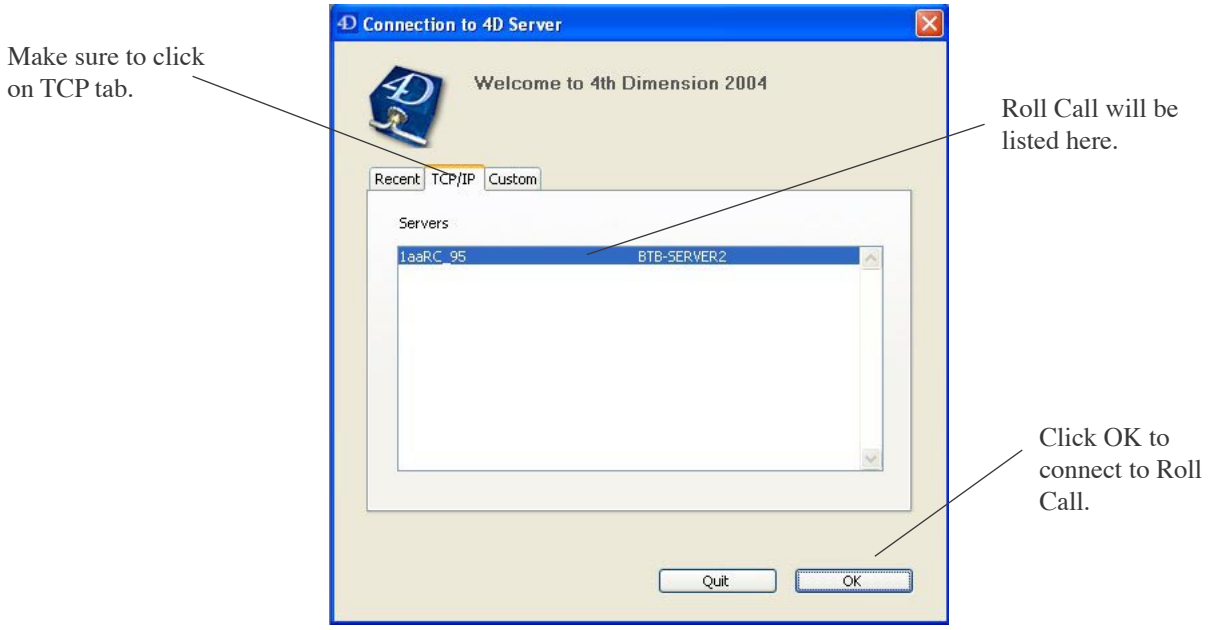
Installing the Client

To install Roll Call Client from the CD, simply place the CD in your CD drive. There will be three Roll Call files: 1)Roll Call 2)Roll Call Client and 3)Roll Call Server. Double click on the Roll Call Client file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

To install Roll Call Client from the downloaded file, double click on the Roll Call Client installation file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

Once the installation is complete, there will be a Roll Call Client icon on the desktop. To start Roll Call, double click on the icon. The Connection to 4D Server window is displayed. Click on the TCP tab. Highlight Roll Call database and click OK.

If this is the first time a client has connected into Roll Call, the Setup Assistant is



displayed. You may enter this information now, or press CANCEL to enter it later. Next you'll need to enter your license number. Select File>Enter License from the main menu. Enter the license number supplied on your invoice and press the tab key. The number of users and people records allowed will be displayed.

How do I configure the check-in station hardware?

In a network environment, each check-in kiosk should have Roll Call Client installed with access to Roll Call Server. In a single kiosk environment, the station should have Roll Call standalone installed.

Bar Code Scanner

If will be using bar code technology to check student's in, plug the scanner into a USB port on your check-in station.

Dymo Labelwriter

If will be printing labels as name tags and/or security labels, plug your Labelwriter into a USB port. Make sure to install the printer drivers.

If you are on a Windows machine, go to Printers and Faxes at the operating system level and choose properties for the Dymo Labelwriter. Click on Printing Preferences. For the 30334 labels, click Portrait. For the 30256 labels, select Landscape.

If you are a portable church, or are plugging the Labelwriters in each Sunday, please note, on some Windows machines, a new printer definition is created each time you plug in the printer. Make sure you only have ONE Labelwriter printer definition and that it is online.

Finger Print Scanner

If you will be using the finger print scanner, plug the scanner into a USB port on your Windows check-in station. Make sure that the biometric client software is installed on your check-in station. See installation instruction for the biometric client and server from M2SYS.

CONFIGURING ROLL CALL FOR CHECK IN

Where do I enter my church information?

You can enter the church address, phone and other demographic information through the Setup Assistant, or through the Admin menu.

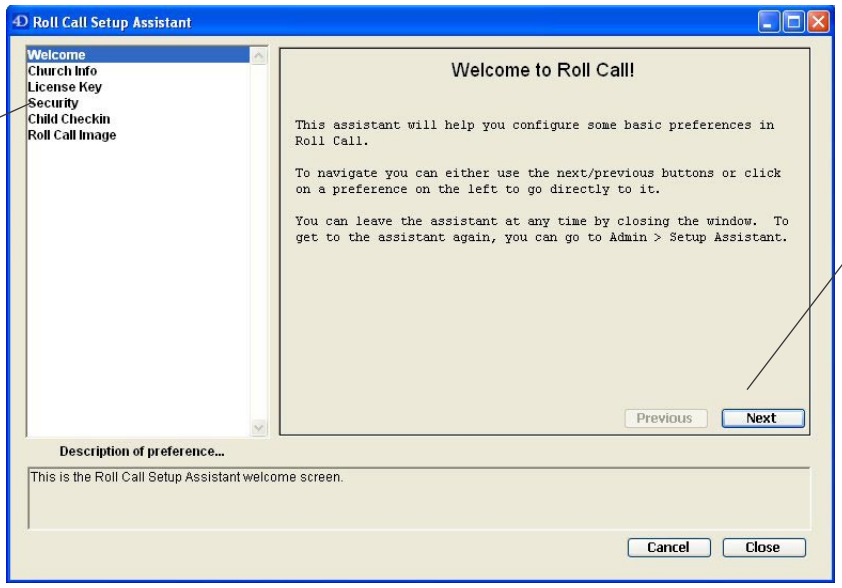
The Setup Assistant allows you to quickly set up the preferences and security you'll need to use the child check-in portion of Roll Call. The Setup Assistant welcome screen will automatically come up the first time you start using Roll Call. Click NEXT from the welcome screen to move on to the Church Info section, or click on the section you'd like to navigate to from the left sidebar.

At a minimum, you'll want to enter the Church Name in this section. You may also wish to enter the church address information. The church address information is used as the return address on donation receipts and pledge progress letters. If you'd like to use the cumulative donations report, make sure to enter your weekly budget. If you'll be using Roll Call's deposit slip, make sure to enter your bank account number. Click NEXT to move to the next section.

Setup Assistant

To enter the church information from the Setup Assistant, click NEXT from the Welcome screen, or click on the link on the left for Church Info.

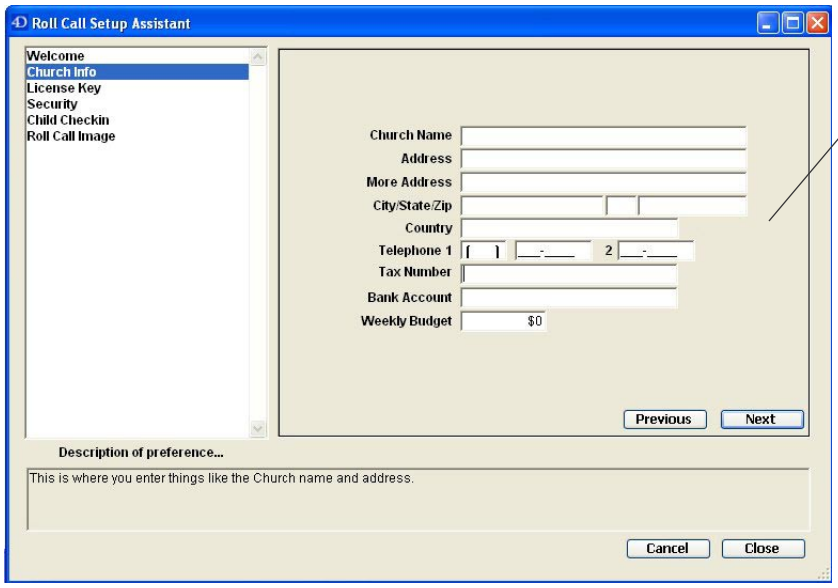
Click on link to go directly to that section.


Roll Call Setup Assistant
Welcome
Church Info
License Key
Security
Child Checkin
Roll Call Image
Welcome to Roll Call!
This assistant will help you configure some basic preferences in Roll Call.
To navigate you can either use the next/previous buttons or click on a preference on the left to go directly to it.
You can leave the assistant at any time by closing the window. To get to the assistant again, you can go to Admin > Setup Assistant.
Previous
Next
Description of preference...
This is the Roll Call Setup Assistant welcome screen.
Cancel
Close

Click NEXT to navigate through each section.

Main Menu

To enter the church information from the Admin menu, select Admin>Church Constants. The Church Info window will be displayed. Enter the church name and address information here.



Enter your church name, address and phone information.

How do I set up Roll Call security?

You can set up security user name and passwords through the Setup Assistant, or through the Admin menu.

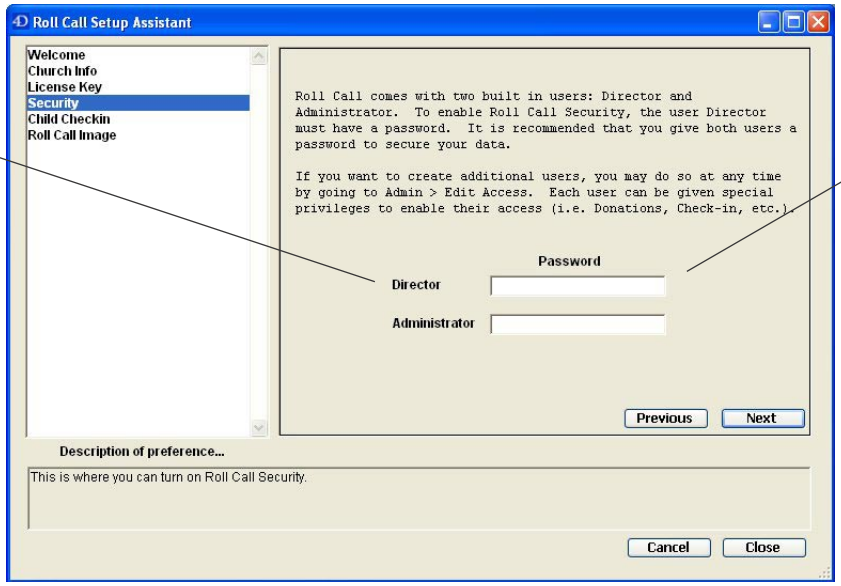
Setup Assistant

To activate Roll Call's security system, you must provide a password for Director. Administrator and Director are two users that come with Roll Call. Do not delete these users. If you'd like to add additional user names, you can do that through the Administration menu in Roll Call.

Enter a PASSWORD in the field to the right of the Administrator and Director users.

If you do not want to have to sign in... leave these fields blank.

NOTE: security is required for the child check in functionality.

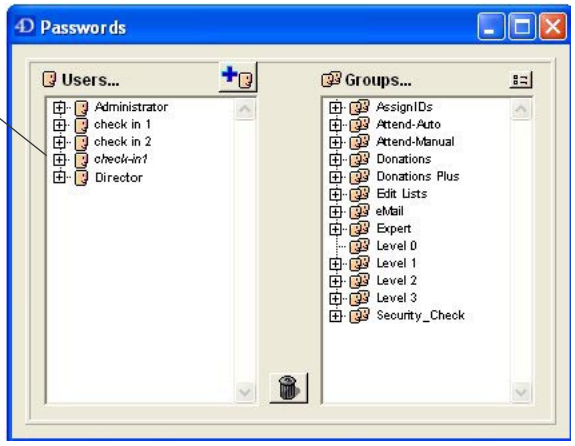

Roll Call Setup Assistant
Welcome
Church Info
License Key
Security
Child Checkin
Roll Call Image
Roll Call comes with two built in users: Director and Administrator. To enable Roll Call Security, the user Director must have a password. It is recommended that you give both users a password to secure your data.
If you want to create additional users, you may do so at any time by going to Admin > Edit Access. Each user can be given special privileges to enable their access (i.e. Donations, Check-in, etc.)
Password
Director
Administrator
Previous
Next
Description of preference...
This is where you can turn on Roll Call Security.
Cancel
Close

To activate the security system, enter a PASSWORD for the Director.

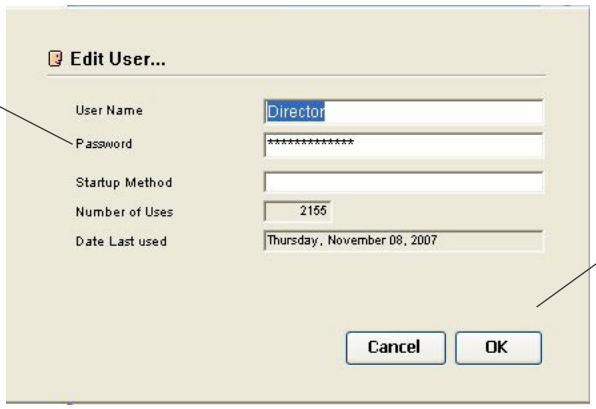
Main Menu

To activate security through the Main Menu, select Admin>Edit Access. The user name and security group window will be displayed. Double click on the Director user name. Enter the password.

Double click on Director, to get to the Edit User window.



Enter password for Director.



Click OK to save the password.

Once you enter a password for the Director, you'll be required to sign on using a user name and password to access Roll Call. This system must be activated to use the child check-in system. This is the User Identification window that will be displayed next time you open Roll Call.

Highlight the user you'd like to sign in as.

Enter password.

Click CONNECT to sign in.

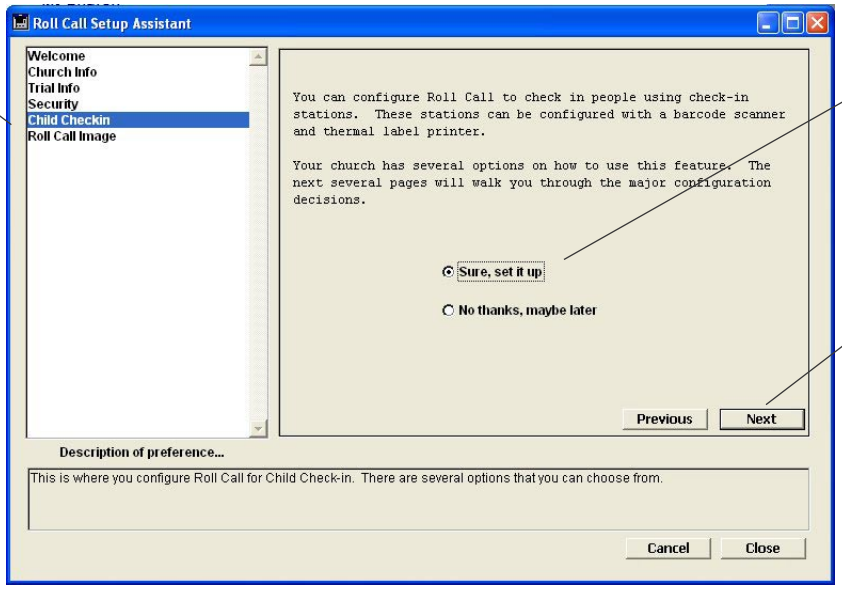
How do I create “check-in” users?

Setup Assistant

To create your check-in users through the Setup Assistant, click on the left sidebar link for Child Checkin or click NEXT until you get to the Child Checkin portion.

Click on the button for “Sure.. lets set it up”. Click NEXT to move through the set up screens. The first child check-in set up option is for “check-in users”. These are the user names that will be used to log onto the check-in stations.

Click on link for Child Checkin.

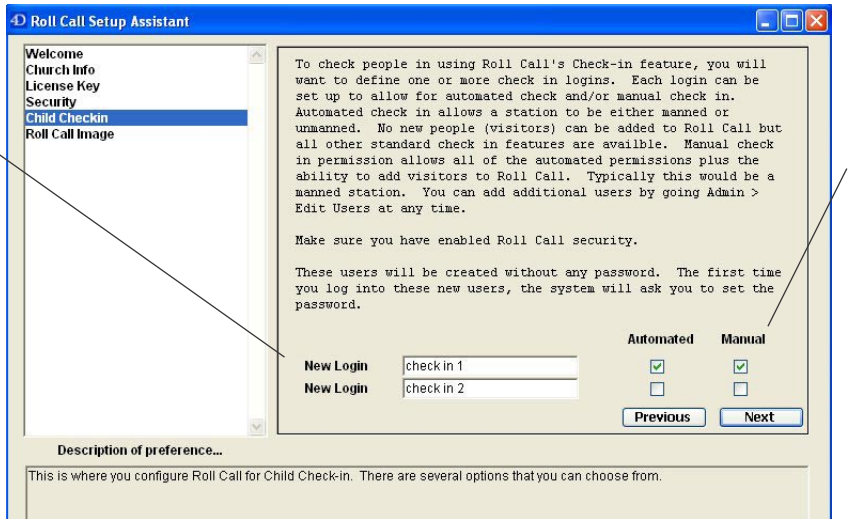

Roll Call Setup Assistant
Welcome
Church Info
Trial Info
Security
Child Checkin
Roll Call Image
You can configure Roll Call to check in people using check-in stations. These stations can be configured with a barcode scanner and thermal label printer.
Your church has several options on how to use this feature. The next several pages will walk you through the major configuration decisions.
Sure, set it up
No thanks, maybe later
Previous
Next
Description of preference...
This is where you configure Roll Call for Child Check-in. There are several options that you can choose from.
Cancel
Close

Select “Sure.. lets set it up”.

Click NEXT to navigate to the next screen.

Enter check in user names.

Each check in user must have the Automated access.


Roll Call Setup Assistant
Welcome
Church Info
License Key
Security
Child Checkin
Roll Call Image
To check people in using Roll Call's Check-in feature, you will want to define one or more check in logins. Each login can be set up to allow for automated check and/or manual check in. Automated check in allows a station to be either manned or unmanned. No new people (visitors) can be added to Roll Call but all other standard check in features are availble. Manual check in permission allows all of the automated permissions plus the ability to add visitors to Roll Call. Typically this would be a manned station. You can add additional users by going Admin > Edit Users at any time.
Make sure you have enabled Roll Call security.
These users will be created without any password. The first time you log into these new users, the system will ask you to set the password.
Automated
Manual
New Login
check in 1
New Login
check in 2
Previous
Next
Description of preference...
This is where you configure Roll Call for Child Check-in. There are several options that you can choose from.

Check Manual if the user can use the QUICK ENROLL.

1. Enter the user name for the first check-in user. This user name can be generic like “checkin1” or it can be more specific, like the name of a person who will be manning a station.
2. There are two security level choices for each check-in user. The first option is Automated. This allows the check-in user to find by name or scan badges. It does not allow the user to enter new people through the QUICK ENROLL option. If you would like the user to also be able to use the QUICK ENROLL for visitors, mark the Manual option as well as the Automated option.

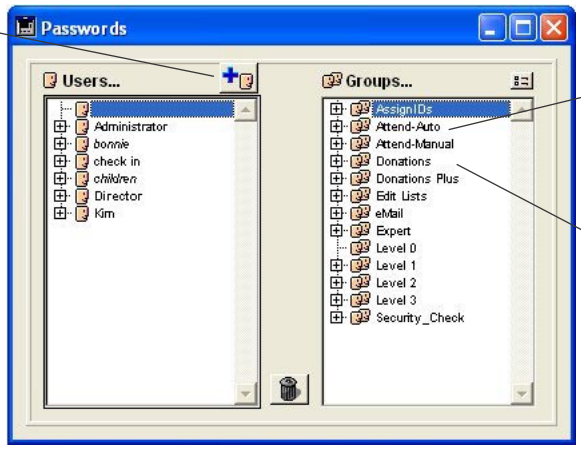
3. The passwords for these users will be blank. The first time you log in as a check-in user, you'll be prompted for a new password.

Main Menu

If you would like to create your check-in users via the Admin menu, select Admin>Edit Access from the main screen. The user and security group window is displayed.

1. Click on the blue plus sign icon, to add a user.
2. Enter the user name and default password for this user.
3. Click OK to save this user.
4. Drag the Auto Attend security group from the right side, and place on top of the check-in user, you just created.
5. If you want this check-in user to be able to add visitors, drag the Attend Manual security group on top of the user you just created.

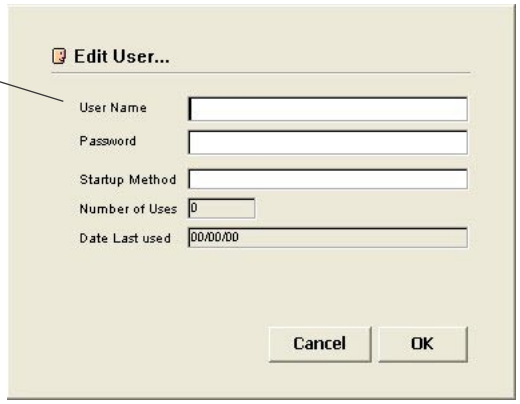
Click plus sign to add a user.



Highlight Attend Auto and drag on top of check in user.

Use the security group Attend Manual, if you want the user to have access to QUICK ENROLL.

Enter user name and default password



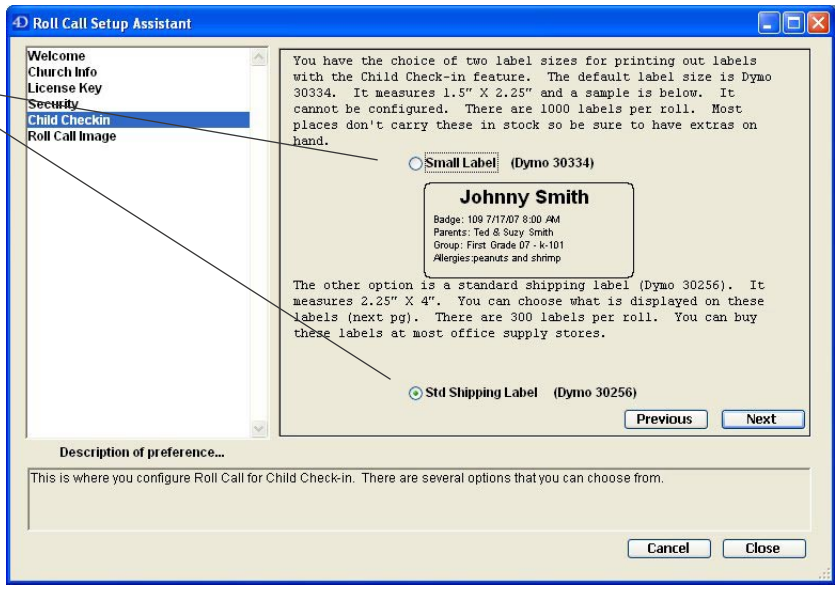
How do I set up my label options?

You can choose your label options from the Setup Assistant, or through the Admin menu.

Setup Assistant

To set up your labels from the Setup Assistant, click on the link for Child Checkin, then click NEXT to the label option. If your church would like to use the smaller (30334) size labels, mark this option. If your church wants to use the shipping label (30256), mark this option and click NEXT.

Select the size labels you'll be using.

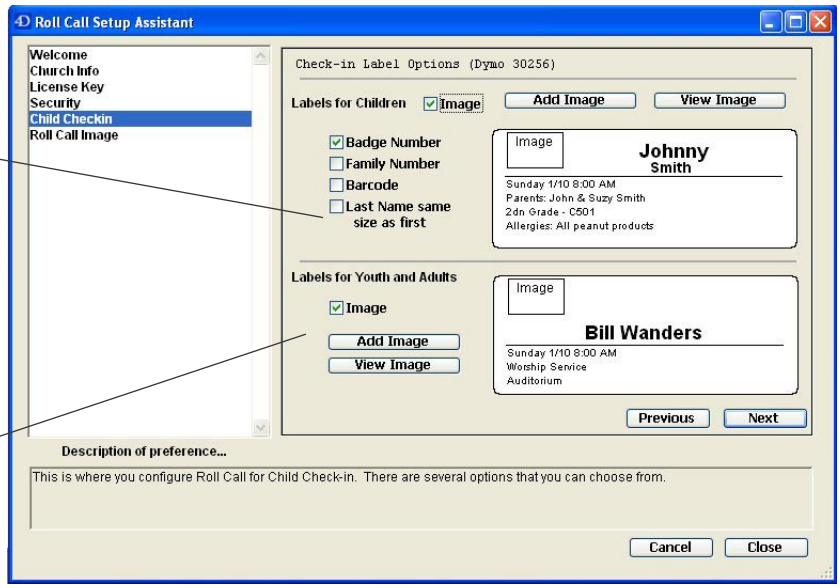

Roll Call Setup Assistant
Welcome
Church Info
License Key
Security
Child Checkin
Roll Call Image
You have the choice of two label sizes for printing out labels with the Child Check-in feature. The default label size is Dymo 30334. It measures 1.5" X 2.25" and a sample is below. It cannot be configured. There are 1000 labels per roll. Most places don't carry these in stock so be sure to have extras on hand.
Small Label (Dymo 30334)
Johnny Smith
Badge: 109 7/17/07 8:00 AM
Parents: Ted & Suzy Smith
Group: First Grade 07 - k-101
Allergies:peanuts and shrimp
The other option is a standard shipping label (Dymo 30256). It measures 2.25" X 4". You can choose what is displayed on these labels (next pg). There are 300 labels per roll. You can buy these labels at most office supply stores.
Std Shipping Label (Dymo 30256)
Previous
Next
Description of preference...
This is where you configure Roll Call for Child Check-in. There are several options that you can choose from.
Cancel
Close

If you chose the shipping label option, the next screen allows you to configure what is printed on that label.

1. Click on the box for *Image,* if you'd like to have your logo printed on the label. Make sure to also click on the box to ADD IMAGE, to import your logo.
2. Check either *Badge Number* or *Family Number* to have that number printed in the upper right of the label.
3. Mark the *Bar Code* box, if you'd like the student's bar code number to be printed on the label.
4. Mark the box *Last Name same size* if you'd like the Last Name and First Name to be in the same size font. If this box is unchecked, the Last Name will be in a smaller font.

Select information printed on labels for children.

Select the information printed on the labels for Youth or Adults.

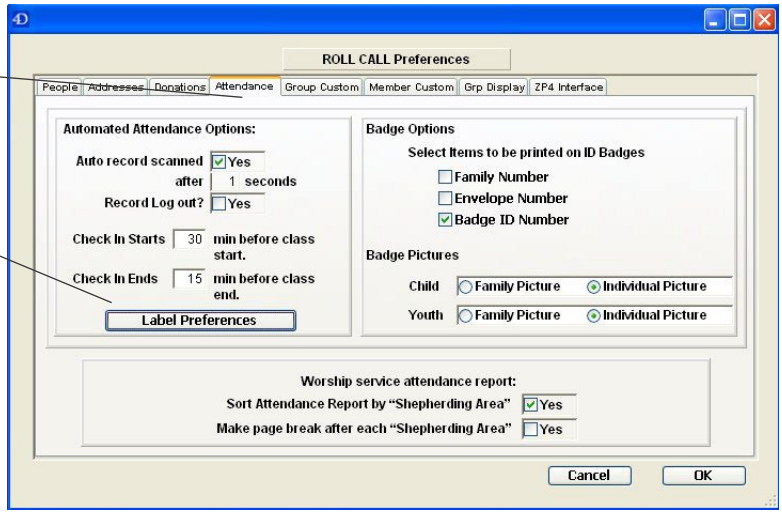


Main Menu

To set up your labels from the menu, select Admin>Preference. Then click on the Attendance tab.

Click on Attendance tab.

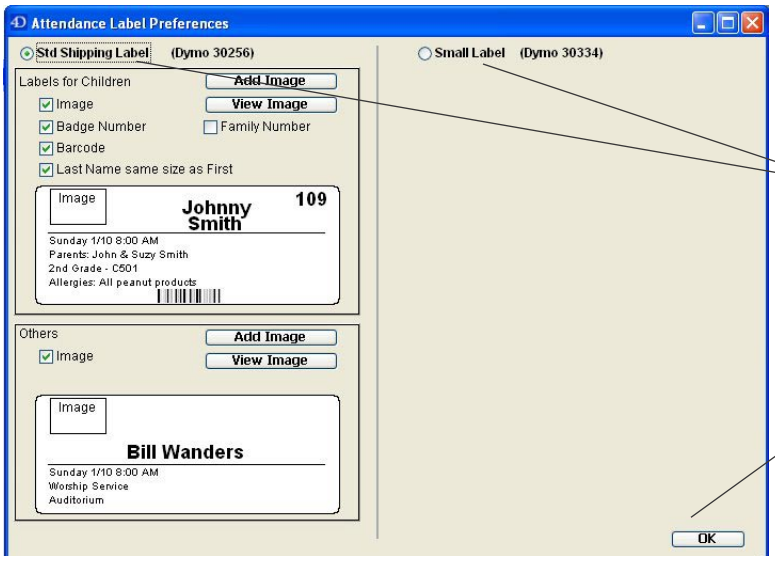
Click on LABEL PREFERENCES.



Select the fields to be printed on the label.

Select your label size.

Click OK to accept.



If you chose the shipping label option, select the fields you'd like printed on the label.

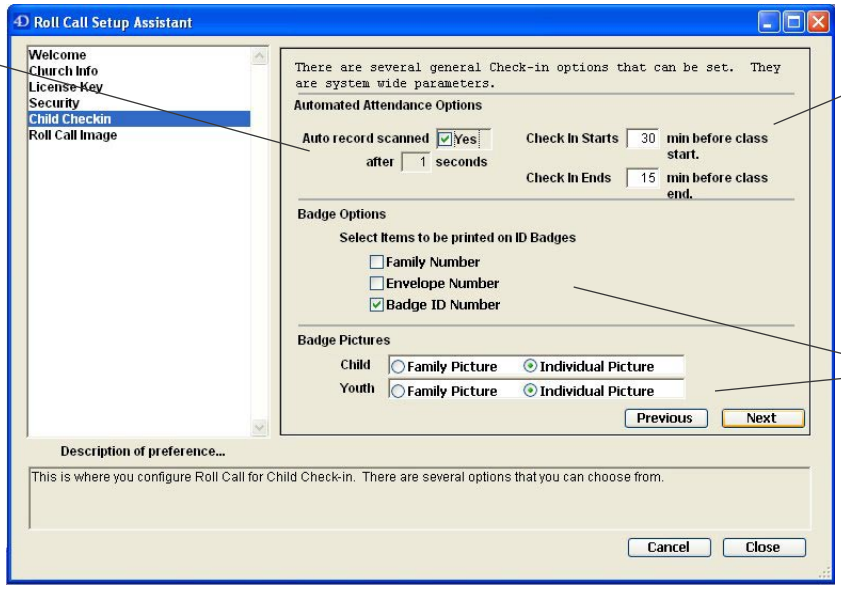
1. Click on the box for *Image,* if you'd like to have your logo printed on the label. Make sure to also click on the box to ADD IMAGE, to import your logo.
2. Check either *Badge Number* or *Family Number* to have that number printed in the upper right of the label.
3. Mark the *Bar Code* box, if you'd like the student's bar code number to be printed on the label.
4. Mark the box *Last Name same size* if you'd like the Last Name and First Name to be in the same size font. If this box is unchecked, the Last Name will be in a smaller font.

How do I set my “check-in” preferences?

Setup Assistant

To set your check-in preferences through the Setup Assistant, click on the left sidebar link for Child Checkin or click NEXT until you get to the Child Checkin portion. Click NEXT until you get to the General Set Up Options.

Check to eliminate the need for the CONFIRM button at check in.



Set check in time preferences.

Set badge preferences.

The first option in the general set up option is *Auto Record Scanned*. Check this box if you’d like to automatically check the student into the first class that comes up on the confirmation screen at check-in. Use this option to speed up the process. It eliminates the step for clicking the CONFIRM button. The downside of this option, is that you don’t have a chance to change which class the child is checked into.

Next, decide how many minutes before a class session begins, you’ll allow students to check-in. For example if a class starts at 9:00 a.m. and you’d like to begin checking students in at 8:30, set the *Check-in Starts* value to 30 minutes. If the same class ends at 10:00 a.m. and you’d like to continue checking students in until 9:45, the *Class Ends* value should be 15 minutes.

The next options on this page are the badge options. If you’ll be creating bar code badges for parents and students to use for check-in, mark the numbers you’d like to include on the badge. Also indicate which picture you’d like included on the badge.

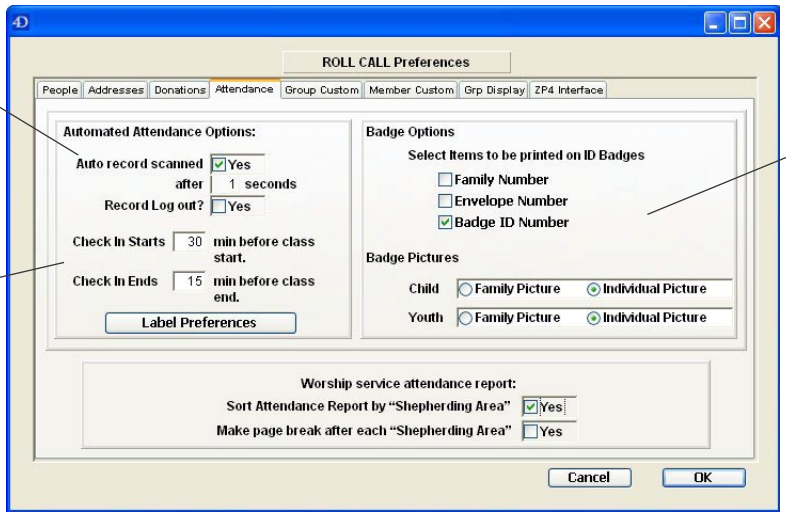
Main Menu

To set the general check-in preferences, via the main menu, simply select Admin>Preferences and click on the Attendance tab.

The first option in the general set up option is *Auto Record Scanned*. Check this box if you’d like to automatically check the student into the first class that comes up on the confirmation screen at check-in. Use this option to speed up the process. It eliminates the step for clicking the CONFIRM button. The downside of this option, is that you don’t

Check if you don't want user to have to press CONFIRM to check in.

Set preferences for check in times.



Select info to be included on the badge.

have a chance to change which class the child is checked into.
Next, decide how many minutes before a class session begins, you'll allow students to check-in. For example if a class starts at 9:00 a.m. and you'd like to begin checking students in at 8:30, set the *Check-in Starts* value to 30 minutes. If the same class ends at 10:00 a.m. and you'd like to continue checking students in until 9:45, the *Check-in Ends* value should be 15 minutes.

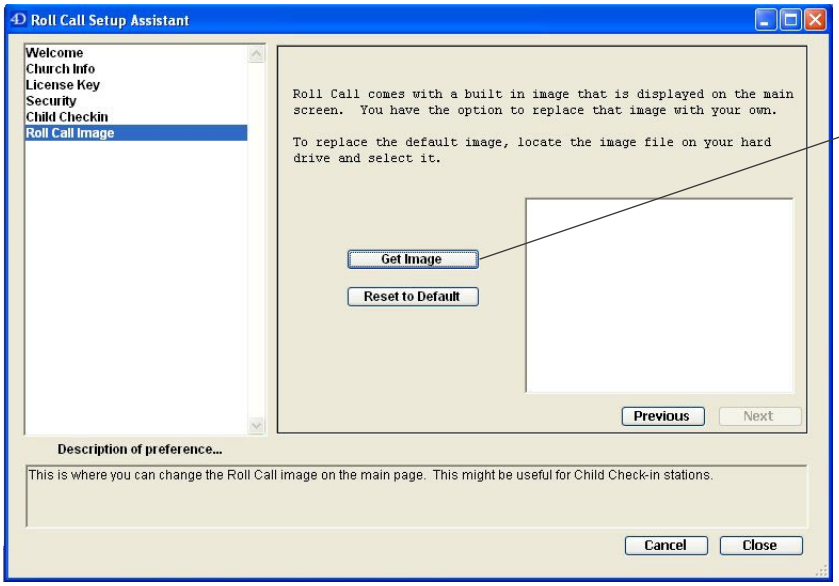
The next options on this page are the badge options. If you'll be creating bar code badges for parents and students to use for check-in, mark the numbers you'd like to include on the badge. Also indicate which picture you'd like included on the badge

Can I display my church's logo on the main screen?

Yes. You can import your church logo from the Setup Assistant. The Setup Assistant is displayed when you first start using Roll Call. You can also get to it by selecting Admin>Setup Assistant from the main menu.

From the Setup Assistant, click on the Roll Call image link on the left sidebar. Click on the GET IMAGE button. Then navigate the jpg or gif image file. Please note, Quicktime must be installed to view images in Roll Call. You can download Quicktime from www.apple.com.

Click on Roll Call Image link.


Roll Call Setup Assistant
Welcome
Church Info
License Key
Security
Child Checkin
Roll Call Image
Roll Call comes with a built in image that is displayed on the main screen. You have the option to replace that image with your own.
To replace the default image, locate the image file on your hard drive and select it.
Get Image
Reset to Default
Previous
Next
Description of preference...
This is where you can change the Roll Call image on the main page. This might be useful for Child Check-in stations.
Cancel
Close

Click on GET IMAGE, and navigate to your logo.

CREATING NEW GROUPS

What is a group?

A group in Roll Call is any grouping of people within your church. It can be a Sunday school class, small group, bible study, activity or event. If you wish to check people into these groups, they must first be defined in Roll Call. The session or the day and time a class meets, must be defined so that Roll Call knows what groups are currently meeting. The students must be enrolled in a group, so that Roll Call knows which class to check someone into.

A group definition in Roll Call includes:

1) The campus. If you are a multi-campus church, you can define the groups for each of your campuses.
2) The group type. This is the general classification of the grouping.
3) The department. This is the ministry that is responsible for the group.
4) The section. This is the name of the group.

What needs to be set up before creating new groups?

Group type

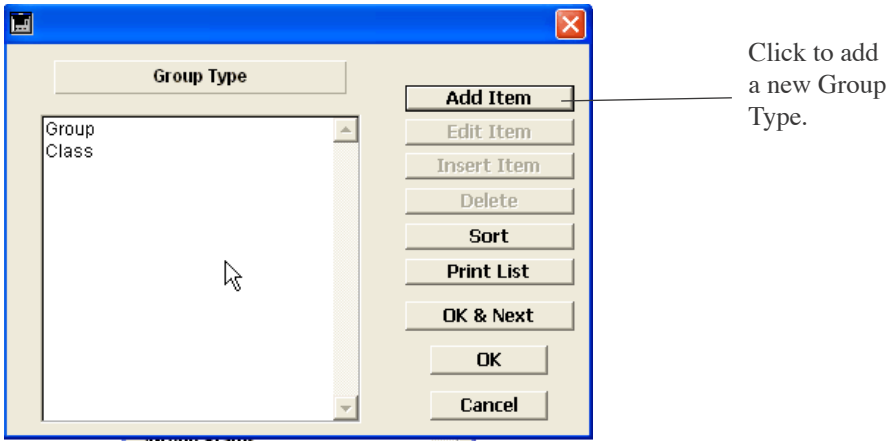
Group type is a high level classification of the group. Roll Call has two types pre-defined: Group and Class. You can define your own types, though. You may want to further refine the types to include: group, class, meeting, volunteers, small groups, cell groups, youth, committee, retreat, etc.

To create the list of valid values for *Group Type*:

1. In the Add a Group window, enter the new value for *Group Type*.
2. Answer "Yes" to the question, do you want to add this group to the list?

OR

1. Go to Admin>Edit Lists.
2. Highlight *Group Type* from the list.
3. Click on ADD ITEM to add other group types.



How do I create a group?

Enter general information

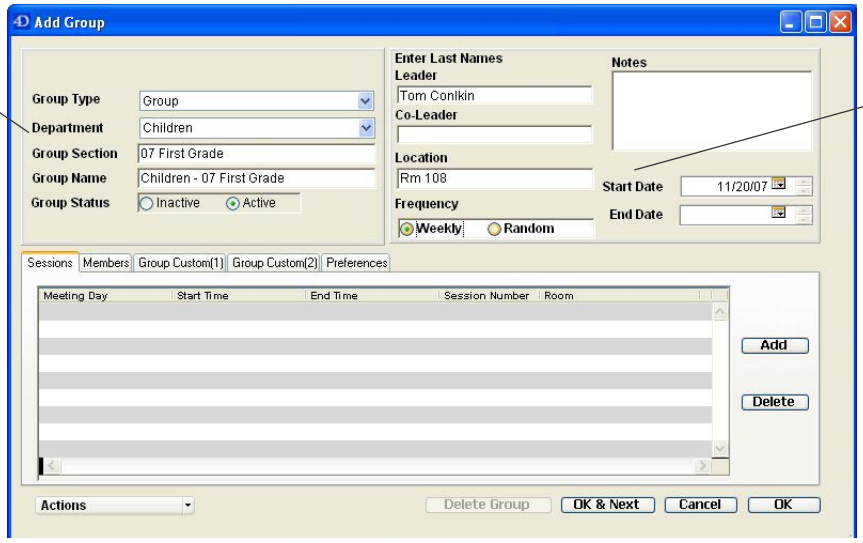
There are three ways to navigate to the Add a Group window:

1. Select Groups>Add Group from the main menu.
2. Select Groups>Group Maintenance from the main menu, then click on Add a Group from the Action Bar.
3. Select Add a Group from the Action drop down box, if you are in the Edit a Group window.

Once you are in the screen to add the group:

1. Enter the values for *Campus, Group Type, Department* and *Status*.
2. Enter the name of the specific group under Group Section. This name must be unique. Consider using the year in the name so you can keep historical information on your groups. For example, 2006-First Grade.
3. If the group has a leader, enter the last name in the *Leader* field. Press tab to view a list of the folks with that last name. Select from the list.
4. If the group has a co-leader, enter the last name in the *Co-Leader* field. Press tab to view a list of the folks with that last name. Select from the list.
5. Enter the *Location* of the group, if applicable.
6. Indicate if the group meets weekly or randomly.
7. You may enter any comments or notes in the *Notes* field.
8. The *Start Date* will default to today's date. You may change it if you'd like.
9. Click OK to save the group and return to the Group Maintenance window.

Enter the high level group information first.



Enter leader, location, frequency and date information.

Create sessions

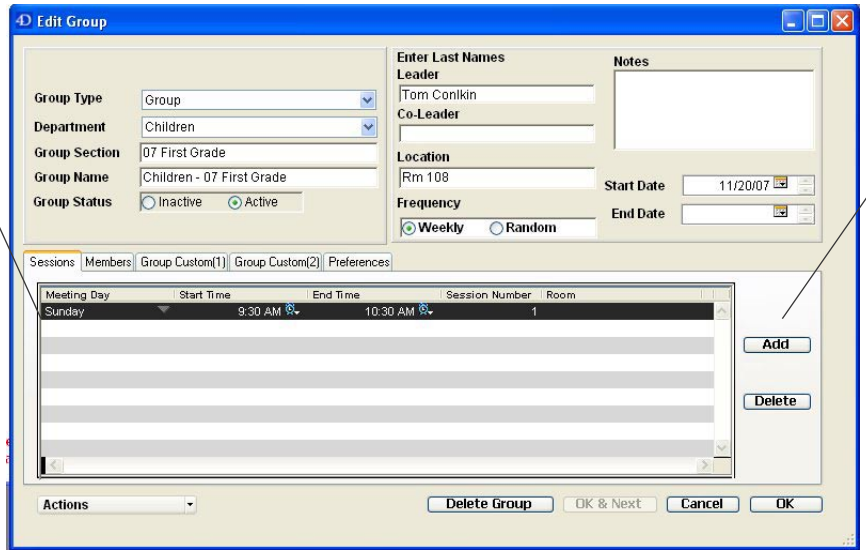
Once you've entered the general information about the group, you'll want to indicate which days and at what times the group meets. The meeting days and times are called sessions in Roll Call. The sessions are very important for the child check in portion of Roll Call. The sessions indicate which classes are available on a given day and time for check in.

To create a session:

1. Click on the session tab, if sessions are not currently displayed.
2. Click on the ADD button. A row will be displayed, with a default of Sunday and time of 12 a.m.

3. Use the *Day of Week* drop down box to select the appropriate day.
4. Click on the clock icon to change the *Start Time*. On the Mac, move your cursor from left to right, first selecting am or pm, then selecting the hour, then selecting the minutes. On Windows, select the time in military time, moving from right to left.
5. The *End Time* will default to one hour past the start time. If you need to change this, click on the clock icon. On the Mac, move your cursor from left to right, first selecting am or pm, then selecting the hour, then selecting the minutes. On Windows, select the time in military time, moving from right to left.
6. Place your cursor under *Room* and double click to enter the room number of this group meeting.

Enter day of the week and time that the group or class meets.



Click ADD to add a session.

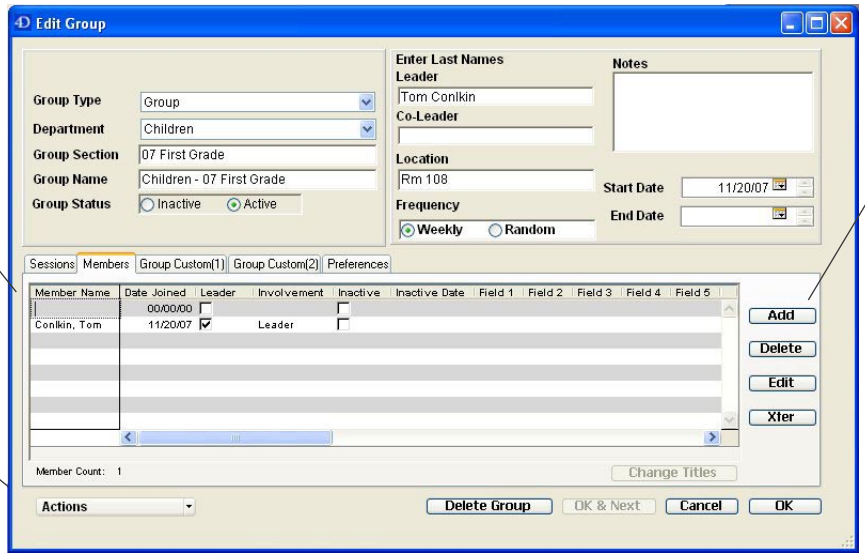
Add Members

To enroll people into the group, press the Members tab. From within the members tab:

1. Click the ADD button or select Member Action>Add Member from the Action drop down box. A line is opened up and the cursor is placed in the *Name* field.
2. Enter the last name (or portion of the last name) of the person you want to enroll.
3. Press the tab or enter key. A list of people with that last name will be displayed. Double click on the appropriate name to select.
4. Tab across to enter any of the custom field data for this person.

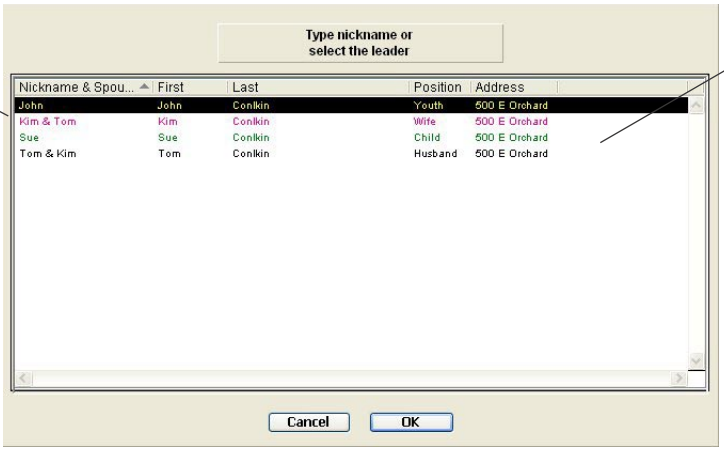
Enter the last name of the new member, press tab.

Action drop down box.



Click ADD to enroll a person into the group.

Highlight the appropriate person, and press return.



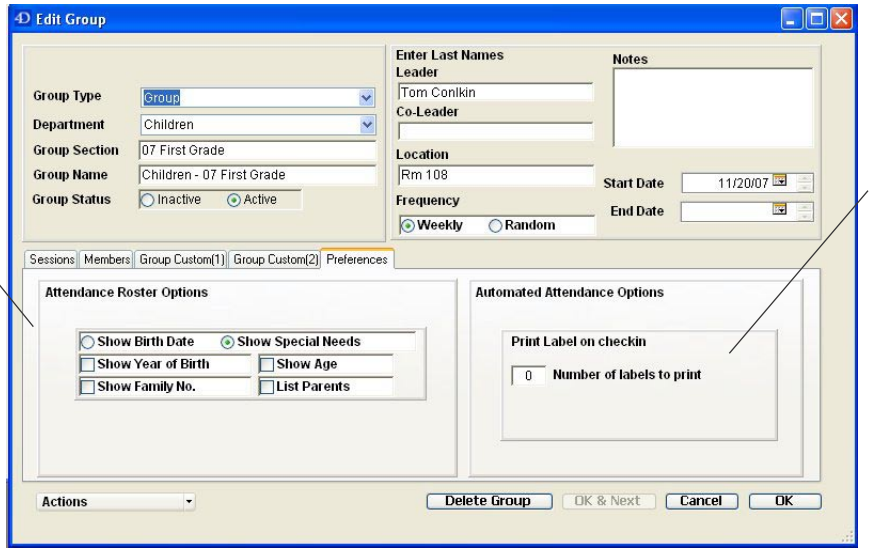
A list of folks with that last name will be presented.

Set Preferences

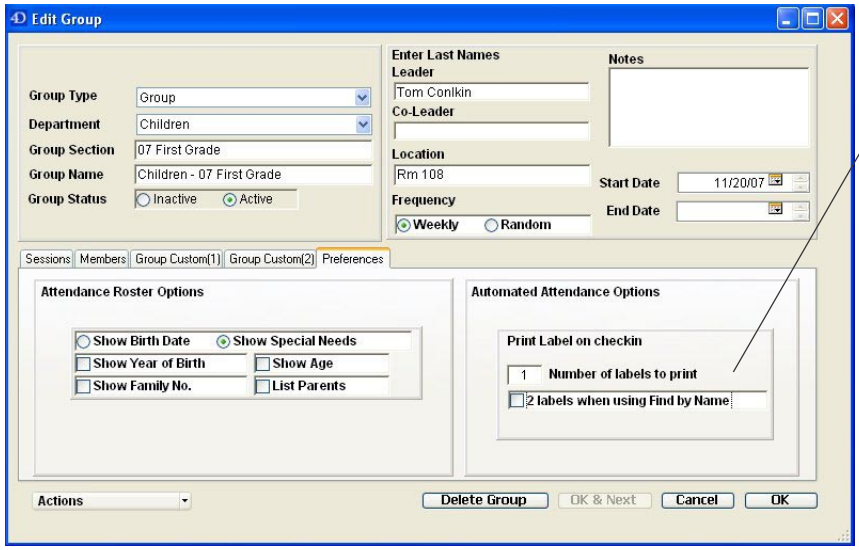
To set your group preferences, press the Preferences tab. From within the Preferences tab:

1. Mark the fields you'd like shown on the attendance roster.
2. Enter the number of labels you'd like printed after a student checks in.
3. Click OK to save the information and return to Group Maintenance.

Select which fields are included on the attendance roster.



Enter the number of labels you'd like printed after the student checks in.



If you select 1 label, you'll also be given the option to print 2 labels if the FIND BY NAME was used.

Can I add people into the database from the group members area?

Yes. If you enter a last name in the members tab, that isn't found in the database, you'll be asked if you would like to add that person. If you answer yes, you'll be prompted for the type of entry.

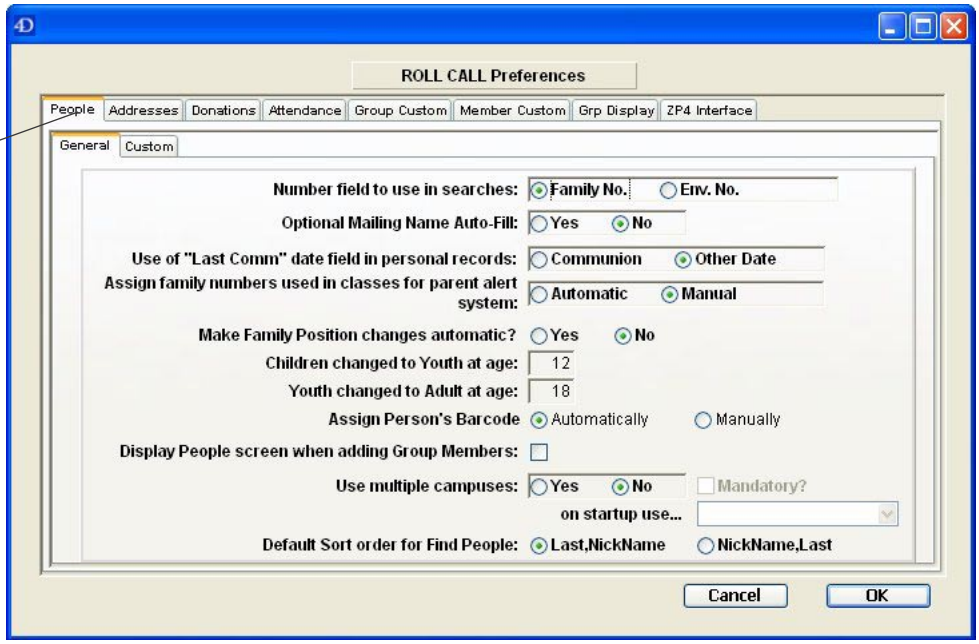
ENTERING FAMILIES

What preferences can I use to speed up data entry?

The following preferences can be used to simplify the data entry process. To get to the preferences:

1. Select Admin>Preferences from the main menu.
2. Click on the People tab.

Note tab options.



Optional Mailing Name

The *Optional Mailing Name* is a field in the address section is used to override the standard mailing names. For example, if you have Jim & Mary Smith, all correspondence to Jim & Mary would be addressed to Mr. & Mrs. Smith OR Jim & Mary Smith. If you enter "The Smith Family" as the optional mailing name, all correspondence will be addressed to "The Smith Family".

If you enter "Yes" to *Auto-Fill* the optional mailing name, the head of the families name will be entered in the optional name field.

Assign Family Numbers

The *Family Number* is an optional number that your church assigns to a family. Many churches use this number as part of a parental notification system.

If you select "Automatic", Roll Call will generate a family number for you. Once you select "Automatic", you will be prompted for the starting number. After clicking OK, all families already in the database will be assigned a family number. As you enter new families, the number will be assigned.

If you switch the preference from "Automatic" to "Manual", the program will ask if you'd like to clear out all existing family numbers. Answer "Yes" if you'd like all family numbers to be blank.

Family Position Changes

The *Family Position* tells Roll Call if the person is the husband, a spouse, child or youth. Use this preference to indicate at what age a child is changed to youth and a youth changed to adult.

Answer "Yes" if you would like these family position changes to be made automatically based on the birth date. Also enter the age at which a child becomes a youth, and the age at which a youth becomes an adult.

Multiple Campus

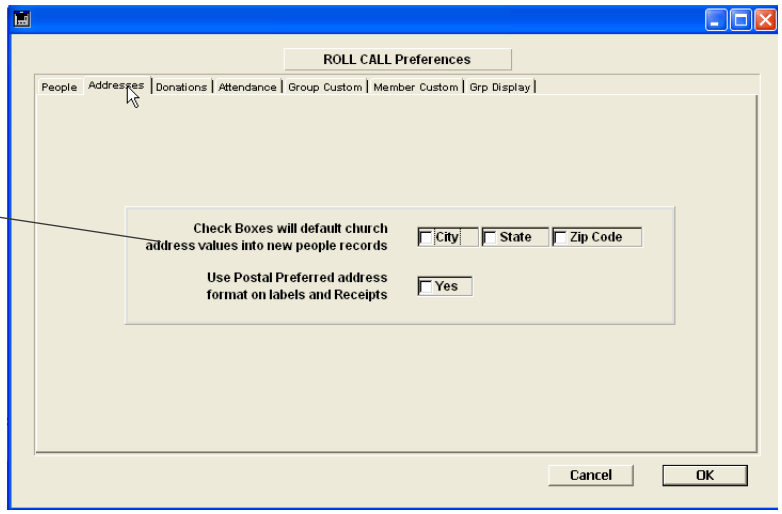
If your church has multiple campus locations, select "Yes" for this preference. By selecting yes, you will now have a field to indicate which campus a person attends. This will also allow you to indicate campus location for groups.

Default Church Address

If you would like to default the person's city to the same city as the church's city, click the *City* box. If you'd like the person's state to default to the same state as the church's state, click the *State* box. If you would like the person's zip code to default to the same zip code as the church's, click the *Zip Code* box.

To modify the address preferences, select Admin>Preferences. Click on the Address tab.

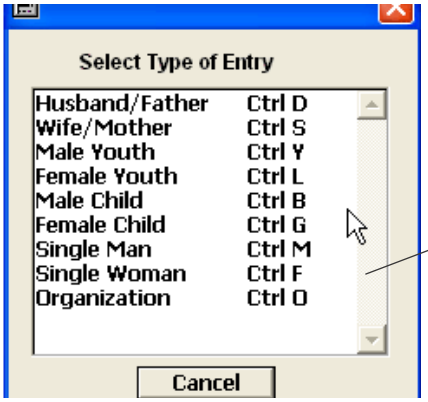
Mark to use churches address as default.



How do I enter a family?

Enter the Head of Family

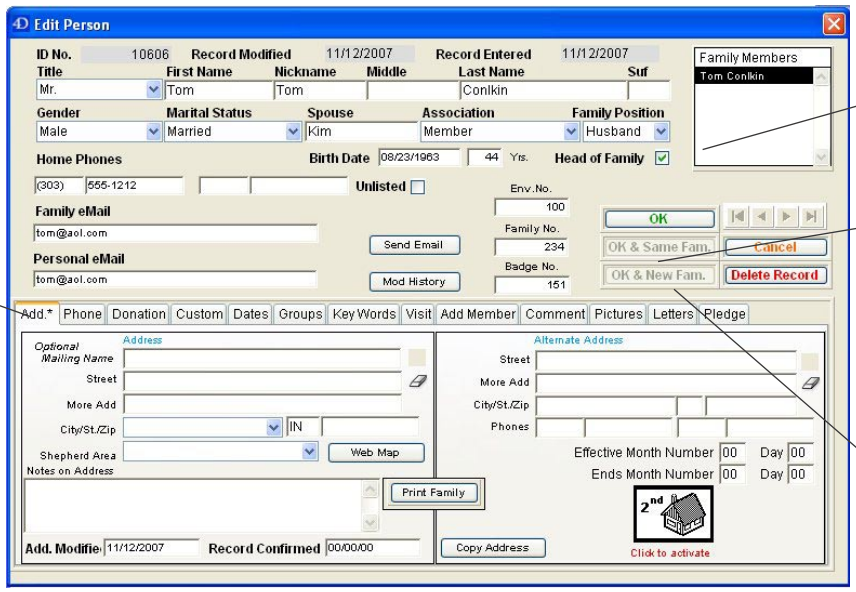
To begin entering people information, select People>Enter New from the main menu. The first window that pops up is the Family Position window. You'll need to need to enter the head of the family first.



Click on the type of person you are entering.

Note short cuts.

Once you select the family position, the Enter People window is displayed. The *Title, Marital Status, Gender* and *Family Position* will be filled in based on the family position you choose. Next begin entering the basic information:



General information

Note tabs for individual information.

Click to save and enter new person from same family.

Click to save and start entering a new family.

1. *First Name* - enter the person's full first name.
2. *Nick Name* - the nick name will default to the value entered for the first name. You can change this to the nick name if it is different than the first name. This field is required.
3. *Middle Name* – enter the middle name. This field is not required.
4. *Last Name* – enter the last name. This field is required. If you are entering a business, enter the business name in the last name field.
5. *Suffix* - enter the suffix Jr., Sr., etc if applicable.
6. *Spouse* - if the person you are entering is married, you can enter the spouses name here.
7. *Family Phones* - enter the home phone numbers here.
8. *Family and Individual Email* – enter the email address that will be used when sending an email to the family and to the individual..
9. *Association* – enter how this person is involved in the church. Are they a Member, Regular Attender, Visitor, etc.
10. *Unlisted* - if the family does not want their phone numbers listed in the directory,

check this box.

11. *Birth Date* - enter the full birth date for the person.
12. *Family Number* – if you selected "automatic" from preferences, this number will be assigned by Roll Call. Otherwise, you may assign a family number manually.
13. *Envelope Number* – you may enter an envelope numbers here, or use the assign envelope number option under the Donations menu to assign numbers en masse.
14. *Badge Number* - you may enter a badge number here, or use the assign badge number option under the People menu to assign numbers en masse.

The next section you'll want to complete is the address information.

1. *Optional Mailing Name* - The name entered here will be used as the mailing name on all correspondence and labels. For example, if you have a husband and wife Jim & Sue Smith, the default mailing label would be Jim & Sue Smith OR Mr. & Mrs. Smith. However, if you entered "The Smith Family" as the optional mailing name, the letters, labels and receipts would be addressed to "The Smith Family"
2. *Address, City, State and Zip*
3. *Shepherd Area* – if your church assigns deacons, congregational care pastors or other lay people to come alongside families, you may indicate that here.
4. *Notes on Address* - this field was used in the past for driving directions. You may use this field for any general comments you'd like.
5. *Alternate Address* – use these fields if the family lives in a different location during the year.
6. *Effective Dates* – indicate the day and month this address become effective
7. *End Date* – indicate the day and month the family returns to their primary address
8. *Activate button* – you must click on the "house" button to activate the alternate address. If the alternate address is activated, and the current date falls within the effective dates, correspondence to this family will be addressed to the alternate address.

Other fields and buttons to note on the people screen:

1. *Add. Modified* – this is a system generated date, which indicates the last date the address was modified.
2. *Record Confirmed* - this date may be entered to indicate the date the person's information was verified.
3. *Print Family button* – this button will kick off a report that outlines all information within the Roll Call database for this family.
4. *Copy Address button* - this button will copy the address into a buffer. You can then paste it into a different program, such as Word or other word processor.
5. *Send email* – use this button to send an email to this individual or entire family.
6. *Web Map* - press this button to connect to the internet and get driving directions to the address.

Enter Other Members of the Same Family

When you are ready to enter the wife or children of this family, click on the OK&SAME FAM button. The Family Position window will be displayed. Select the appropriate family position for this person. The Title, Gender, Last Name, Marital Status will all have default values based on the family position you selected. The family phone, family email, family number and address information will already be entered based on the information you entered for the head of family.

Click OK&SAME FAM to continue entering people in the same family. To create a new family, click OK&NEW FAM.

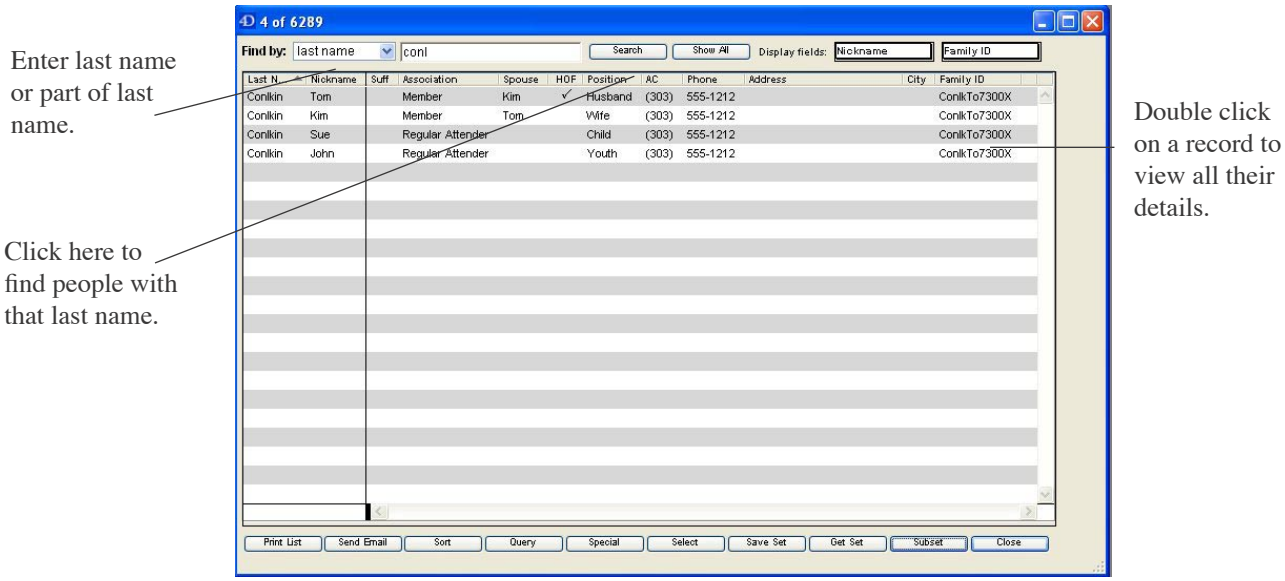
How do I enter cell, work or other individual phone numbers?

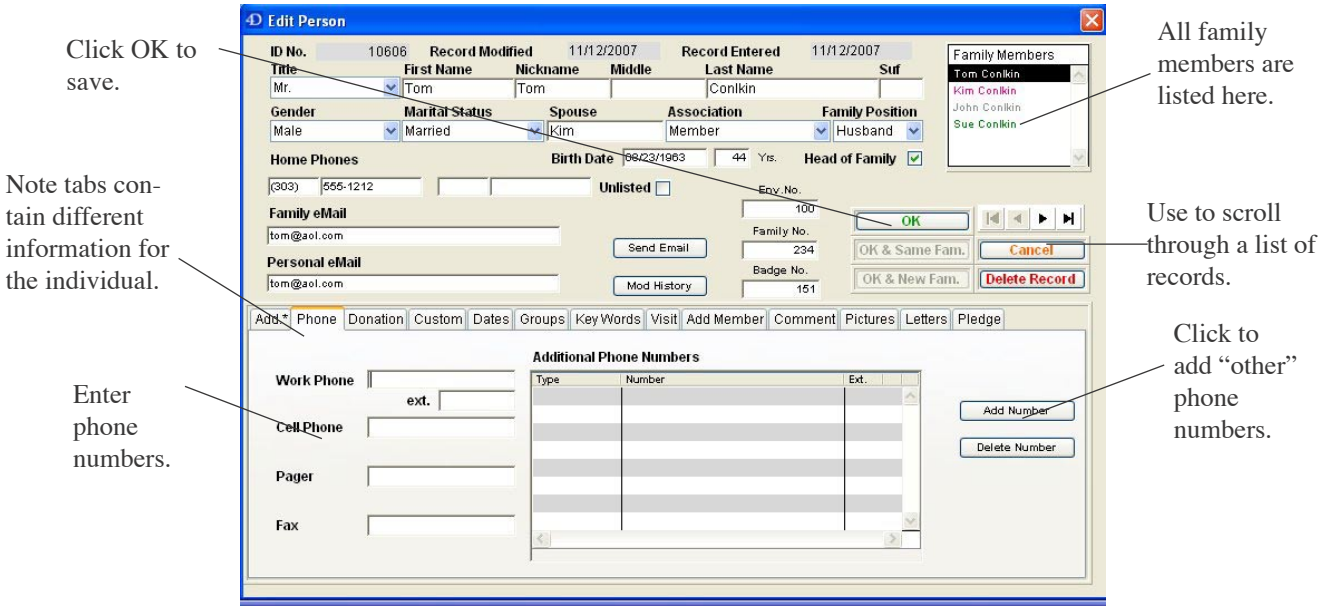
Find the person's record

If you are not already in the person's record, select People>Find Person from the menu or type CTRL F (for Windows) or CMD F (for Mac). A Find Person window will be displayed. Enter the last name of the person you want. Then press enter or click SEARCH. A list of all the people with that last name will be displayed. Double click on the appropriate record.

Enter work, cell, pager and fax numbers.

Click on the Phone tab. Enter the phone number in the appropriate field. You do not need to enter any of the formatting characters, just the number.





What comment fields are available?

There are several types of comment fields available as part of an individual's record. The first two comment fields are found under the Comment tab.

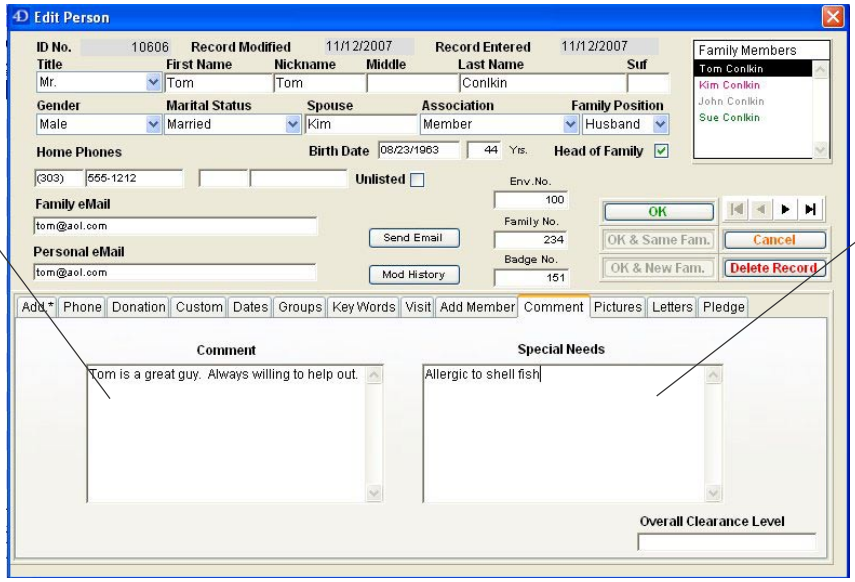
General Comments

This field, on the left side of the comment tab, is free format text area. This can be used of any general comments required for this person. These comments can be viewed by anyone with access to Roll Call.

Special Needs

This field, on the right side, of the comment tab, is used to indicate any allergies or special needs that a person may have. This information can be printed on the labels after the child has checked in. This information can be viewed by anyone with access to Roll Call.

Enter general comments on the left side

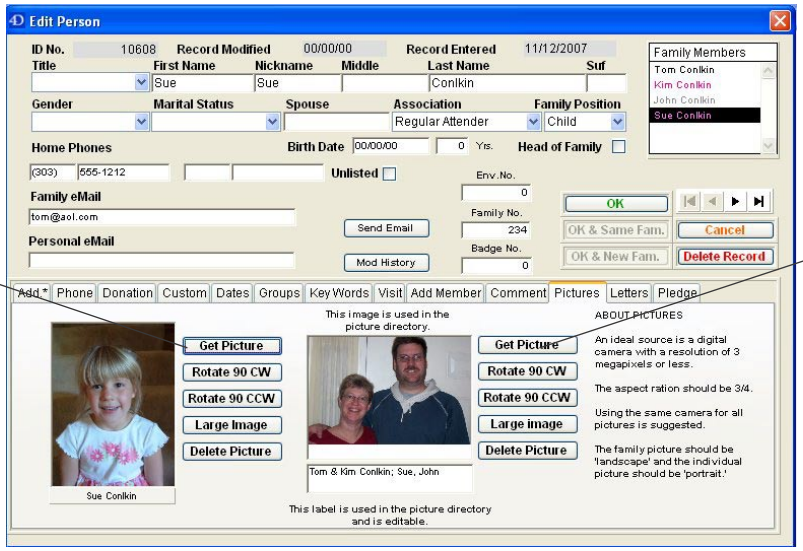

Edit Person
ID No. 10606 Record Modified 11/12/2007 Record Entered 11/12/2007
Title First Name Nickname Middle Last Name Suf
Mr. Tom Tom Conlkin
Gender Marital Status Spouse Association Family Position
Male Married Kim Member Husband
Home Phones Birth Date 08/23/1963 44 Yrs. Head of Family
(303) 555-1212 Unlisted
Family eMail tom@aol.com
Personal eMail tom@aol.com
Send Email
Mod History
Env.No. 100
Family No. 234
Badge No. 151
OK
OK & Same Fam.
OK & New Fam.
Cancel
Delete Record
Family Members
Tom Conlkin
Kim Conlkin
John Conlkin
Sue Conlkin
Add * Phone Donation Custom Dates Groups Key Words Visit Add Member Comment Pictures Letters Pledge
Comment
Tom is a great guy. Always willing to help out.
Special Needs
Allergic to shell fish
Overall Clearance Level

Allergy or special instructions can be printed on the labels and badges

How do I import pictures into Roll Call?

You can store 2 pictures in Roll Call, an individual picture and a family picture. The family picture is used in the picture directory and can be printed on the badge. Individual pictures are used for live check-in and can also be printed on the badge.

Click to get individual picture.


Edit Person
ID No. 10608 Record Modified 00/00/00 Record Entered 11/12/2007
Title First Name Nickname Middle Last Name Suf
Sue Sue Conlkin
Gender Marital Status Spouse Association Family Position
Regular Attender Child
Home Phones Birth Date 00/00/00 0 Yrs. Head of Family
(303) 555-1212 Unlisted
Family eMail tom@aol.com
Personal eMail
Send Email
Mod History
Env.No. 0
Family No. 234
Badge No. 0
OK
OK & Same Fam.
OK & New Fam.
Cancel
Delete Record
Family Members
Tom Conlkin
Kim Conlkin
John Conlkin
Sue Conlkin
Add * Phone Donation Custom Dates Groups Key Words Visit Add Member Comment Pictures Letters Pledge
This image is used in the picture directory.
Get Picture
Rotate 90 CW
Rotate 90 CCW
Large Image
Delete Picture
Sue Conlkin
Get Picture
Rotate 90 CW
Rotate 90 CCW
Large image
Delete Picture
Tom & Kim Conlkin; Sue, John
ABOUT PICTURES
An ideal source is a digital camera with a resolution of 3 megapixels or less.
The aspect ration should be 3/4.
Using the same camera for all pictures is suggested.
The family picture should be 'landscape' and the individual picture should be 'portrait.'
This label is used in the picture directory and is editable.

Click to get family picture.

Import individual picture

Importing pictures is done through the people screen.

1. Find a person's record.
2. Click on the Picture tab.
3. Click on the GET PICTURE button to the right of the individual picture box on the left.
4. An open dialog box will be displayed. Navigate to the appropriate image file.
5. Highlight the file, then click OPEN.
6. The picture will be displayed in the individual picture box. If the picture needs to be rotated, use the Rotate 90 CW or Rotate 90 CCW to line the picture properly.

Import family picture

Importing family pictures is done through the people screen. Once it has been imported, the picture can be viewed from any person's record in that family.

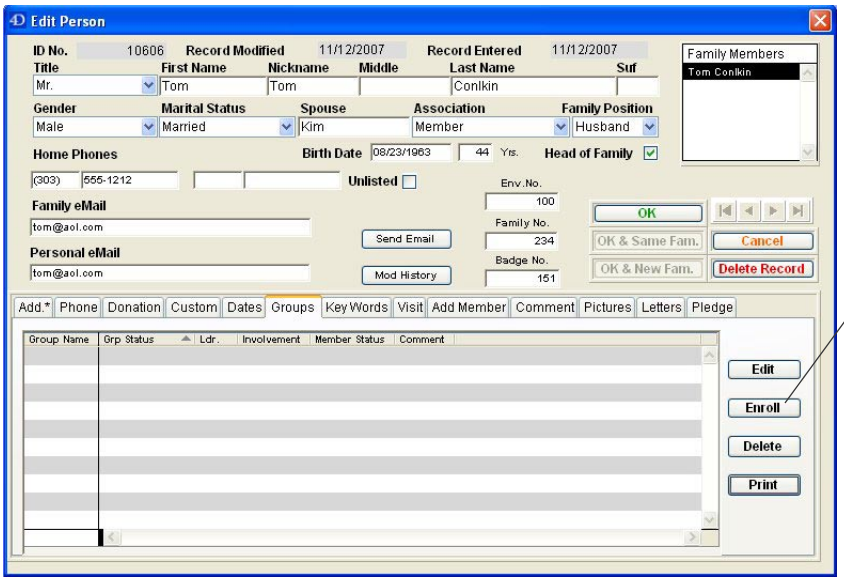
1. Find a person's record.
2. Click on the Picture tab.
3. Click on the GET PICTURE button to the right of the family picture box on the right.
4. An open dialog box will be displayed. Navigate to the appropriate image file.
5. Highlight the file, then click OPEN.
6. The picture will be displayed in the family picture box. If the picture needs to be rotated, use the Rotate 90 CW or Rotate 90 CCW to line the picture properly.
7. The field below the family picture will have the names of all the people in the family. You may change this label. If the family is large, you may want to change the label to "The Smith Family" for example. If the label is over 30 characters, the picture directory format gets out of alignment.

Picture tips and hints

1. The pictures should all be taken with the same camera.
2. Do not crop pictures.
3. The aspect ratio should be ¾.
4. Quicktime must be installed to view pictures.

Can I enroll students in a class or group from the people screen?

Yes, if you've already created the groups in Roll Call. To enroll a person in a group or class, click on the Groups tab from that individuals record. Next click on the ENROLL BUTTON. Select the group or class from the drop down box.



Click on the ENROLL button to make the person a member of a class or group.

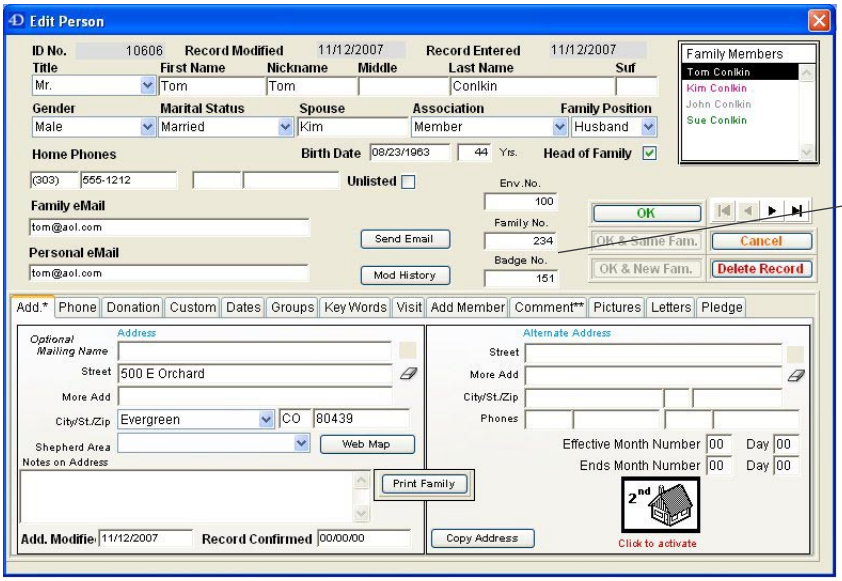
How do I assign family numbers?

There are two methods of assigning family numbers. The first is to enter the number manually through the people screen. The second is to assign them automatically.

People Screen

You may want to assign family numbers manually, if you already have existing family numbers. For example, if you use a parental paging system that has family numbers, you can enter the same number into Roll Call.

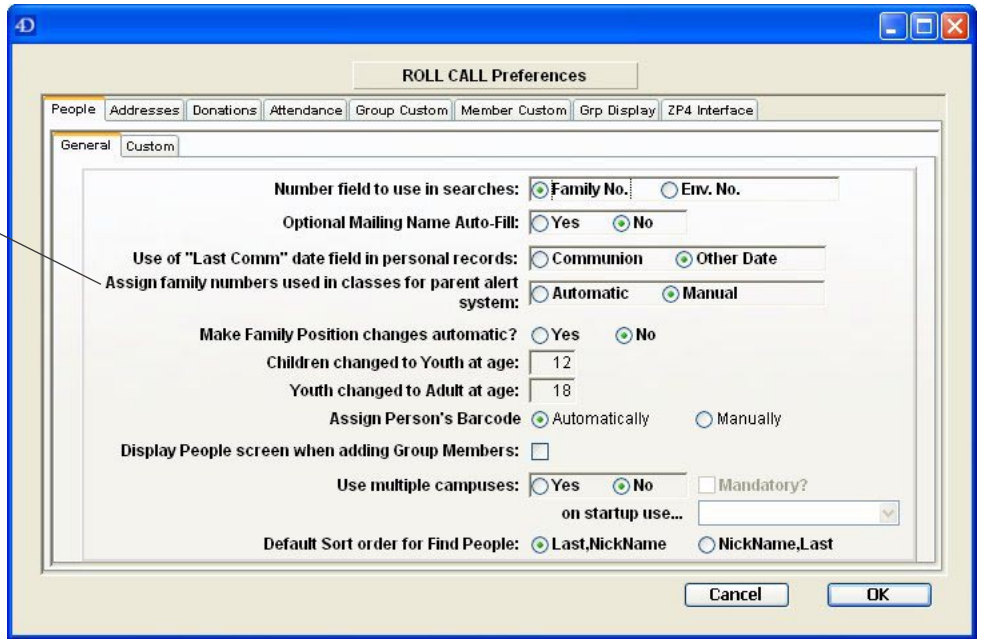
First, pull up the person's record. Select People>Find People. Enter the last name or other criteria. Double click on the appropriate person's record. Next enter the number in the *Family No* field.



Enter number in family number field.

Assign Automatically

To assign family numbers automatically, you'll need to set a preference. Select Admin>Preferences from the main menu. Click on the radio button to assign family numbers "automatically".


ROLL CALL Preferences
People Addresses Donations Attendance Group Custom Member Custom Grp Display ZP4 Interface
General Custom
Number field to use in searches: Family No. Env. No.
Optional Mailing Name Auto-Fill: Yes No
Use of "Last Comm" date field in personal records: Communion Other Date
Assign family numbers used in classes for parent alert system: Automatic Manual
Make Family Position changes automatic? Yes No
Children changed to Youth at age: 12
Youth changed to Adult at age: 18
Assign Person's Barcode Automatically Manually
Display People screen when adding Group Members:
Use multiple campuses: Yes No Mandatory?
on startup use...
Default Sort order for Find People: Last,NickName NickName,Last
Cancel
OK

Click here to automatically assign family numbers.

Next you'll be prompted for the starting number. Enter that number and click OK. Each family in your database will be assigned a number. If there are any families that already have family numbers, Roll Call will ask if you want to overwrite those. Once this preference is set, any new families entered in the database will be automatically assigned the next number in the sequence.

How do I assign badge numbers?

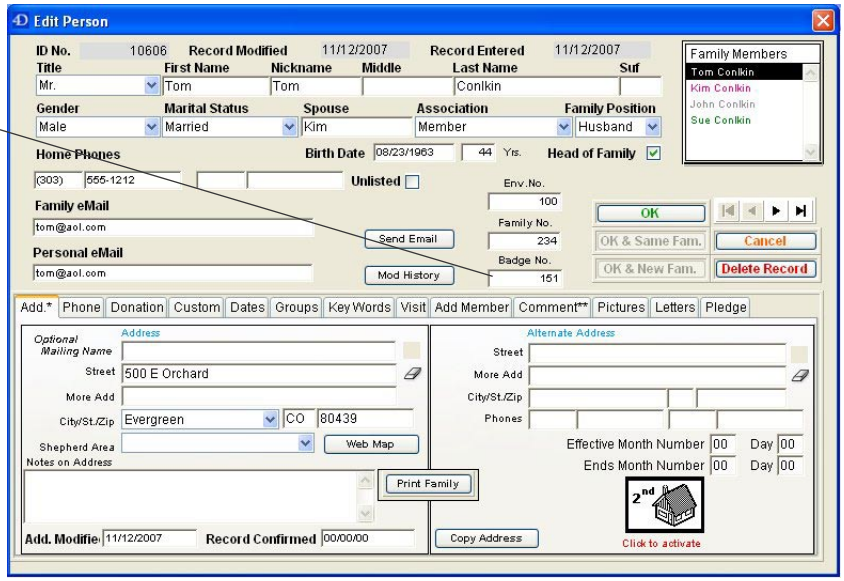
There are two methods of assigning badge numbers. The first is to enter the number manually through the people screen. The second is to assign them automatically.

People Screen

You may want to assign badge numbers manually. If you already have a badge system or other person number that you use, you can enter that number as the badge number in Roll Call.

First, pull up the person's record. Select People>Find People. Enter the last name or other criteria. Double click on the appropriate person's record. Next enter the number in the *Badge No.* field.

Enter badge numbers here



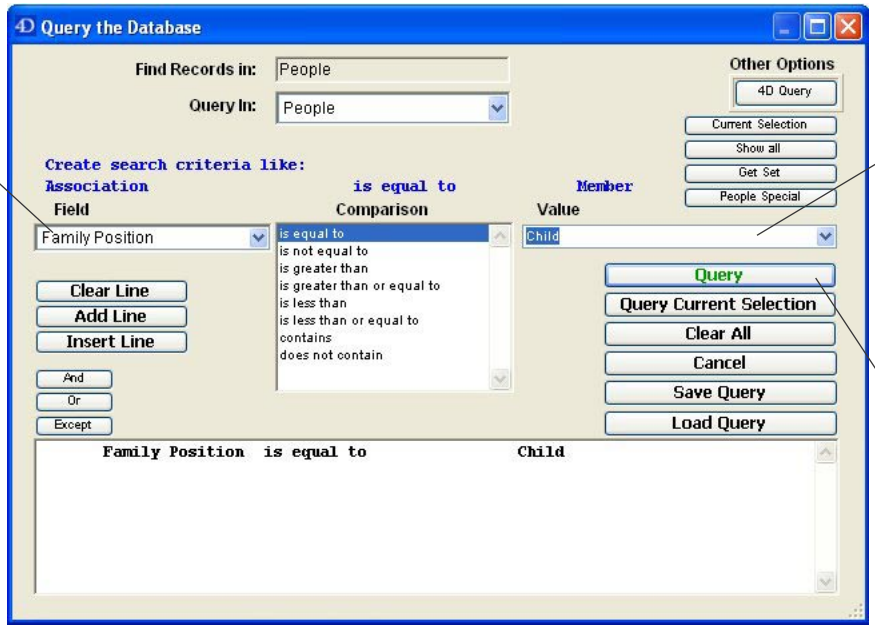
Assign Automatically

If you want to assign badge numbers to a group of people "en mass", you can assign them using the People>Assign Badge Numbers menu. When you select Assign Badge Numbers from the drop down menu, you'll be presented with the Query Editor. Use this to pick the people that will be assigned badge numbers.

Lets take a look at a few examples. Lets say you want to assign badge numbers to all the children in your database, you can:

1. Select Family Position from the *Field* drop down box.
2. Highlight "is equal to" in the *Comparison* box.
3. Select Child from the *Value* drop down box.
4. Click QUERY to see your results.

Use the field drop down box to select your query criteria.



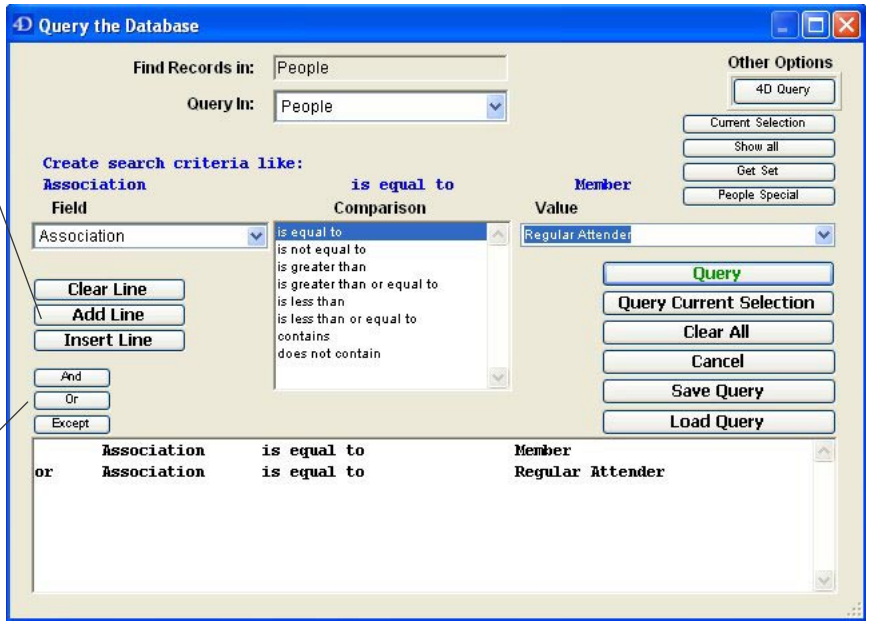
Enter the value that you're looking for here.

Click QUERY to see your results.

In this next example, lets say you want to assign badge numbers to all of your members and regular attenders. In the Query Editor:

1. Select Association from the *Field* drop down box.
2. Highlight "is equal to" in the *Comparison* box.
3. Select Member from the *Value* box.
4. Click on the ADD LINE button.
5. Click the OR button.
6. Select Association from the *Field* drop down box.
7. Highlight "is equal to" in the *Comparison* box.
8. Select Regular Attender from the *Value* box.
9. Click on the QUERY button to see your results.

Use the ADD LINE button to add additional criteria.



Click on the OR button if you want the results to meet either/or criteria.

Once you are satisfied with the list that was returned from the Query, click on the DONE button. You'll be prompted for the starting badge number. Enter your starting number and click OK. Roll Call will tell you how many people will be assigned badge numbers, starting with the number you entered. If you wish to assign those numbers, click YES. If you'd like to cancel the operation, click NO.

USING BAR CODES

What needs to be configured to use bar codes?

To print the bar code font on badges or sign in rosters, you'll need to move the Roll Call font file into your system font folder.

Windows

If you are using a windows standalone installation, you'll want to copy the font file from C:\BytheBook\RollCall\BarCode to your C:\Windows\Font folder.

If you are using Roll Call on Windows as part of a network installation, you'll need to copy the font file from C:\BytheBook\RollCall_Client\BarCode to C:\Windows\Font folder

Mac

If you are using a OSX standalone installation, you'll want to copy the font file from Applications:RollCall:Barcode to your HD:Library:Fonts folder.

If you are using Roll Call on Mac as part of a network installation, you'll need to copy the font file from Applications:RollCall_Client:Barcode to your HD:Library:Fonts folder.

What are my options for checking students in with a bar code?

Bar Code Badge

One option for checking in students, is to create bar code badges. These badges are produced using Roll Call. The badges are printed 8 per page. They can be printed on card stock paper, then laminated or placed in name tag holders. The badges are printed with a bar code which identifies the student. They can also include your church logo, the student's picture, family number or badge number, allergy information and the parent's names.

Key Tag

Another option is to have key chain tags printed with a bar code to identify the student.

Bar Code Roster

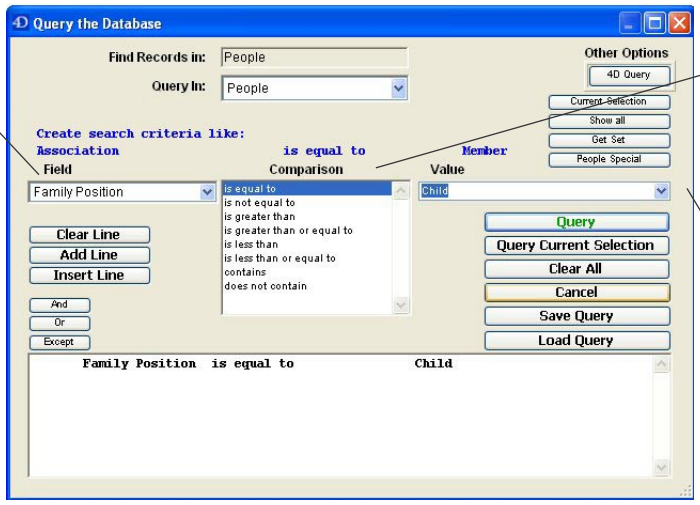
Another possible method for checking students in is by bar code roster. Instead of swiping a badge or entering a name, the person manning the check-in station can find the students name on the roster and scan it.

How do I create the bar code badge?

To print the badges, select Reports>Print Badges from the main menu. The query editor will be presented. Use this to determine which badges will be printed. For example, if you would like to print a badge for all children, do the following query:

1. Select Family Position in the *Field* drop down box.
2. Leave "is equal to" highlighted in the *Comparison* box.
3. Select "Child" in the *Value* drop down box.
4. Click QUERY.

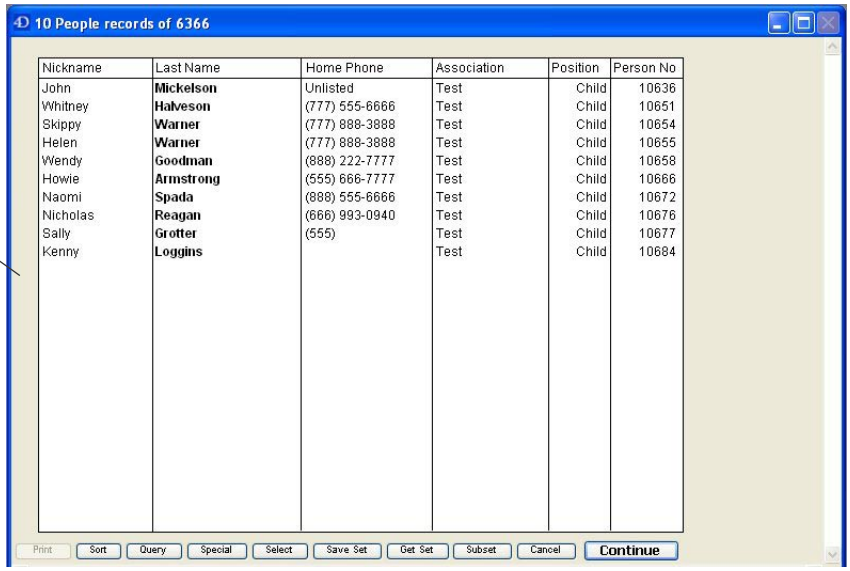
Select field name from drop down box.



Select appropriate comparison operator.

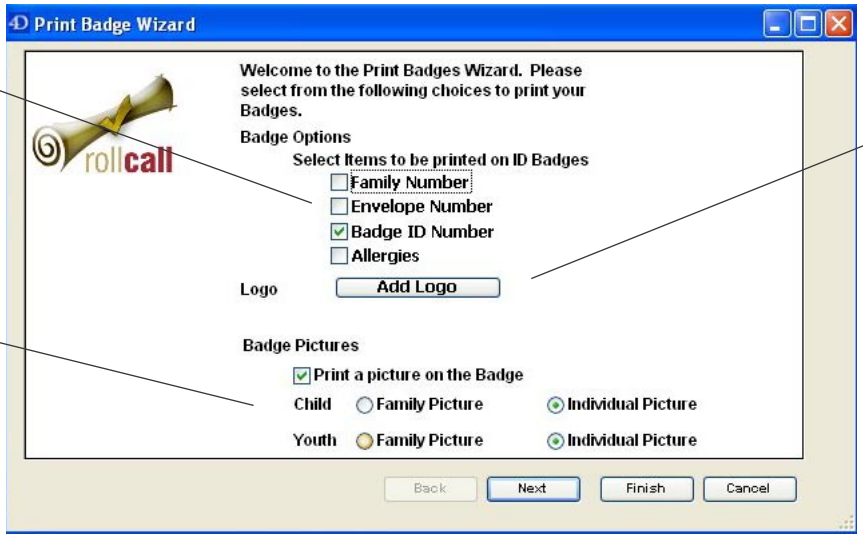
Select value for the query.

The results of the query. These folks will have badges printed.


10 People records of 6366
Nickname | Last Name | Home Phone | Association | Position | Person No
John | Mickelson | Unlisted | Test | Child | 10636
Whitney | Halveson | (777) 555-6666 | Test | Child | 10651
Skippy | Warner | (777) 888-3888 | Test | Child | 10654
Helen | Warner | (777) 888-3888 | Test | Child | 10655
Wendy | Goodman | (888) 222-7777 | Test | Child | 10658
Howie | Armstrong | (555) 666-7777 | Test | Child | 10666
Naomi | Spada | (888) 555-6666 | Test | Child | 10672
Nicholas | Reagan | (666) 993-0940 | Test | Child | 10676
Sally | Grotter | (555) | Test | Child | 10677
Kenny | Loggins | | Test | Child | 10684
Print
Sort
Query
Special
Select
Save Set
Get Set
Subset
Cancel
Continue

The results of your query are displayed. If this list looks right, click CONTINUE. Next the badge wizard is displayed. Select the fields you'd like printed on the badge. Click FINISH to send the badges to the printer.

Select the identifying number to be printed on the badge.



Click to import a logo file to be printed on the badge.

Select picture to be included on badge.

What needs to be set-up to use key chain tags?

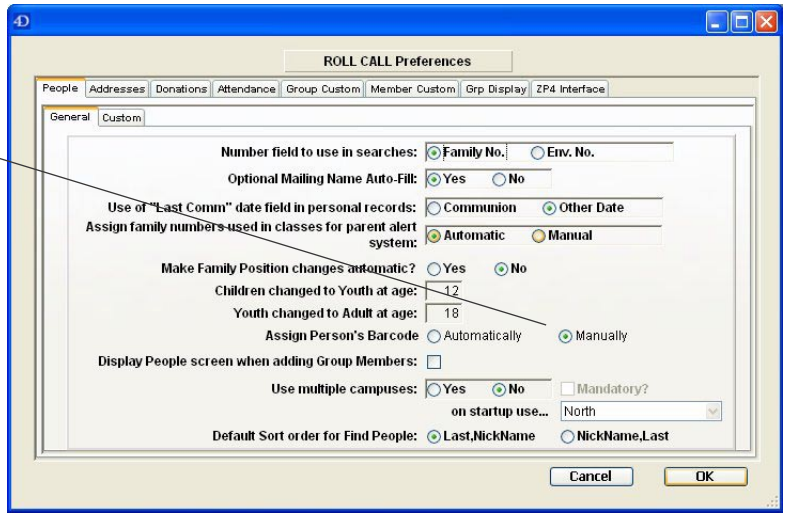
Order tags from a printer

Make sure the printer uses our bar code font, places a Q and a carriage return after the number.

Preferences

Set the assignment of bar code numbers to “Manual”. This is done in preferences. Select Admin>Preferences from the main menu. Select manual assignment.

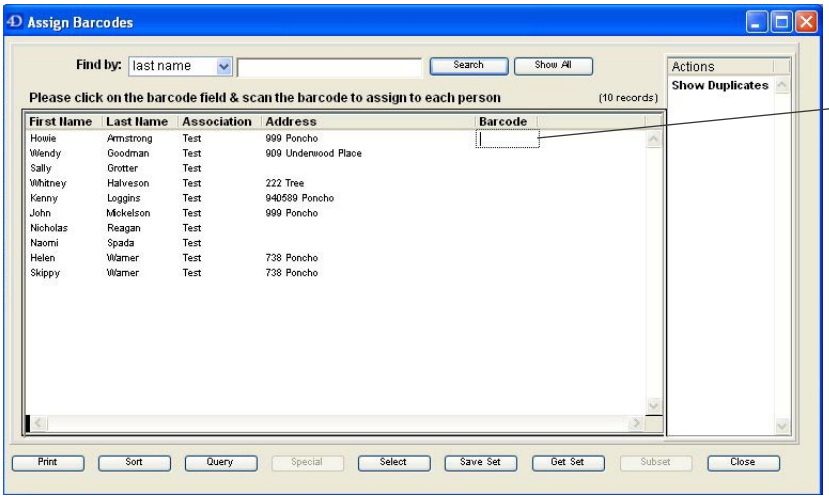
Select Manual assignment of bar codes if you’ll be using pre-printed key chain tags.



Assign key tag numbers to individuals

Next, you’ll need to assign the key tag number to a person in Roll Call. Select People>Assign Barcodes. From this screen, you can find people by their last name, bar code number or association. You can also click SHOW ALL to list all the people in your database. Place the cursor in the bar code field to the right of the person’s name, and scan the key tag that will be given to that person.

Create list of people who will be given key chain tags.



Scan the key tag for the first person.

Assign key tag numbers to a family

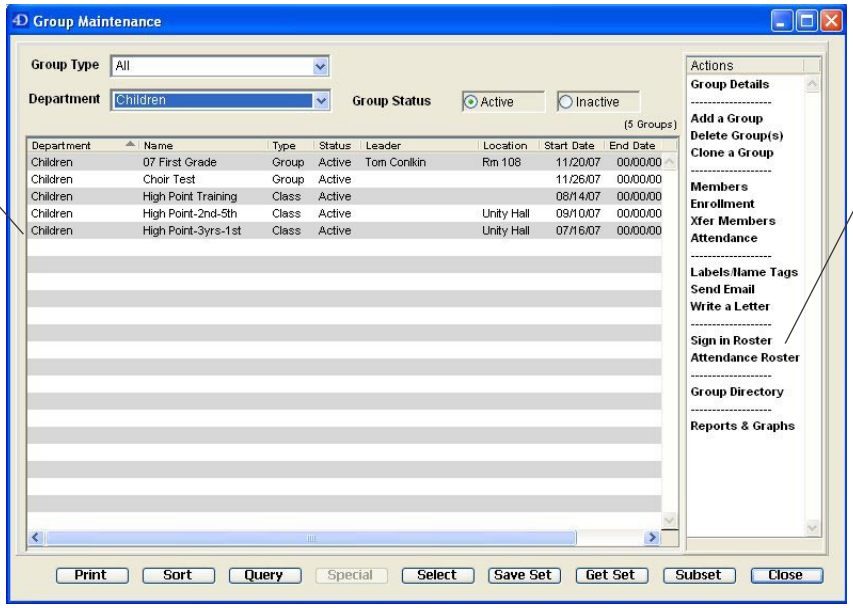
If you would like to use the same key tag for an entire family, simply scan the same key chain tag for each person in the family.

How do I create a bar code roster?

The bar code roster can be printed from the Group Maintenance screen.

1. Select Groups>Group Maintenance.
2. Highlight the group or groups for the roster.
3. Click on “Sign in Roster” on the Action bar.
4. Select the fields you’d like displayed on the roster. Make sure to include bar code.
5. Click FINISH to send the roster to the printer.

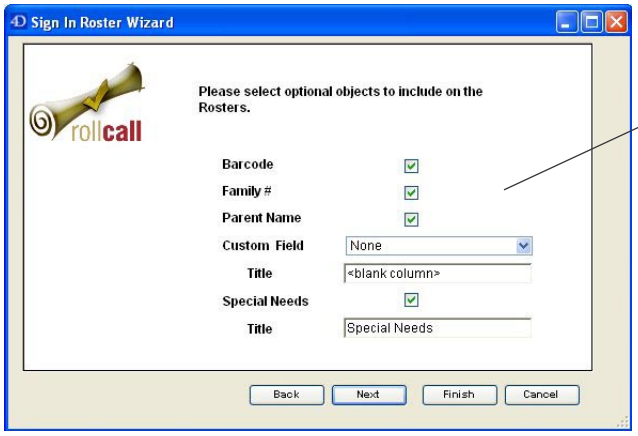
Highlight the group or groups.



Click sign in roster.

Sign In Roster Wizard
rollcall
Welcome to the Sign In Roster Wizard. Please complete the following information.
Date for the Roster?
12/02/2007
Include Leaders?
Print for all Groups meeting this day
Note: Date defaults to next Sunday, however, any date can be specified. Rosters will only be printed for those selected groups that have a session for the date specified.
Back
Next
Finish
Cancel

Select date for the roster, click NEXT.

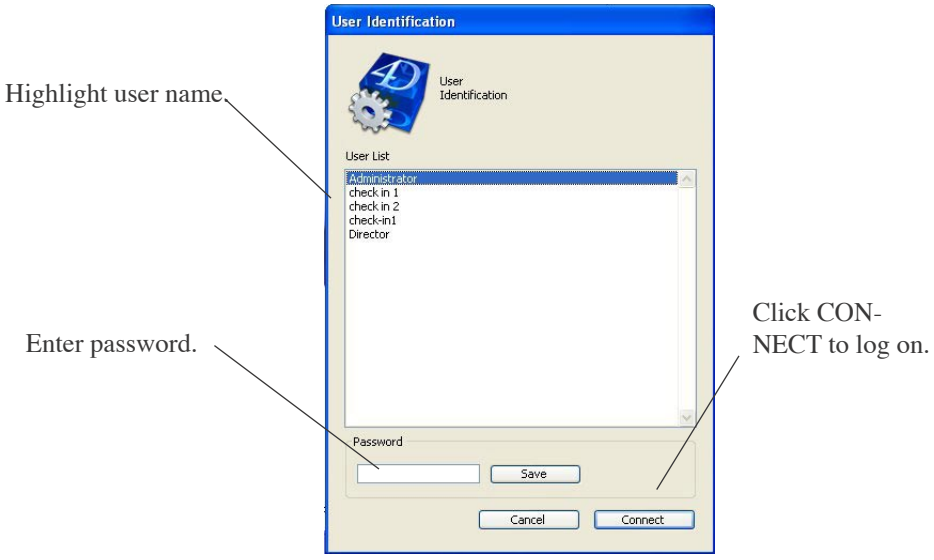


Select the fields you’d like to include on the roster.

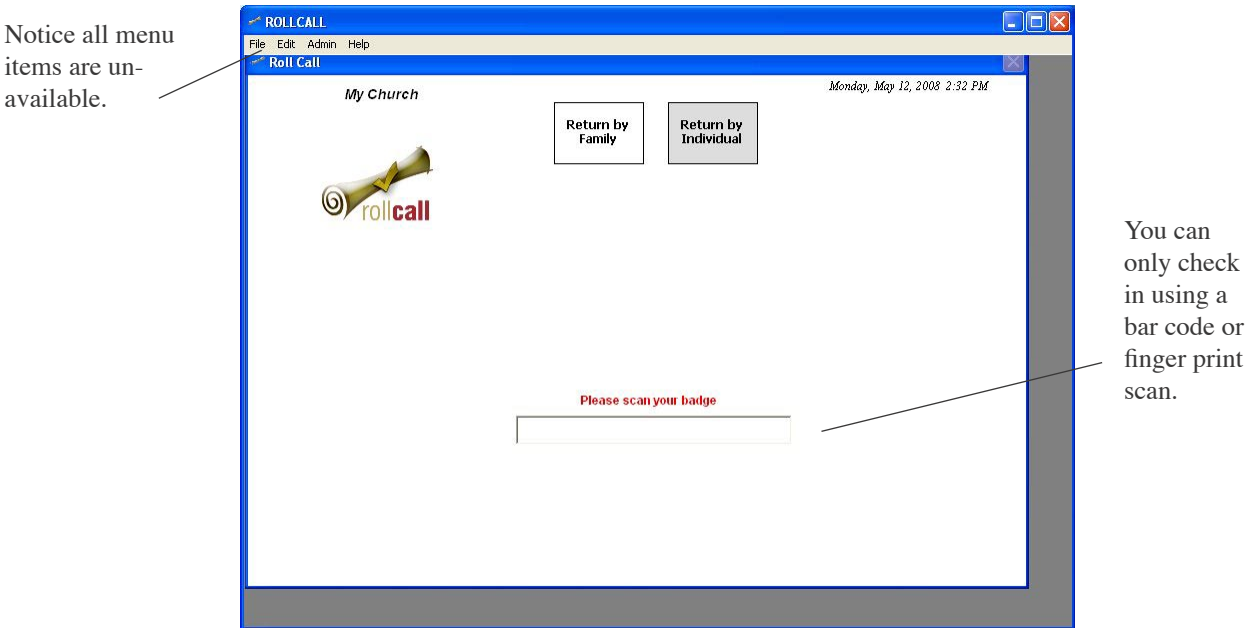
OPERATING THE CHECK IN STATIONS

How do I log onto the check-in stations?

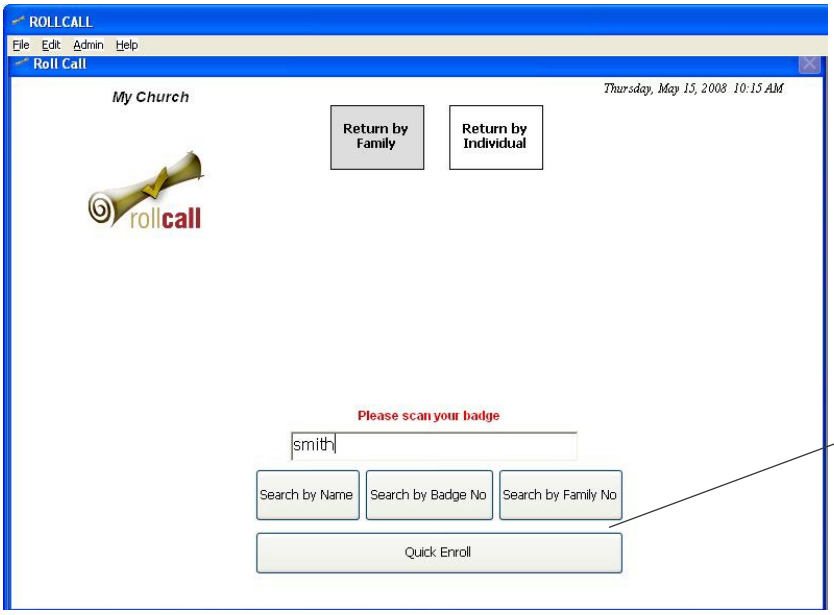
To use the check-in functionality of Roll Call, you need to log on with a user name that has "Auto Attend" or "Attend Manual" privileges. To start Roll Call, double click on the Roll Call icon. The User Identification screen is displayed. If you do not get the User Identification screen, you'll need to configure Roll Call security. See the chapter on Check-in Configuration.



If you sign on with a user name that has only Auto Attend, the following screen will be displayed. This station can only check-in existing people. Visitors cannot be entered into the system.


Notice all menu items are unavailable.
ROLLCALL
File Edit Admin Help
Roll Call
My Church
Monday, May 12, 2008 2:32 PM
Return by Family
Return by Individual
rollcall
Please scan your badge
You can only check in using a bar code or finger print scan.

If you sign on with a user name that has Auto Attend and Attend Manual privileges, the following screen will be displayed. Notice the QUICK ENROLL button is displayed. This will allow you to enter visitor information.

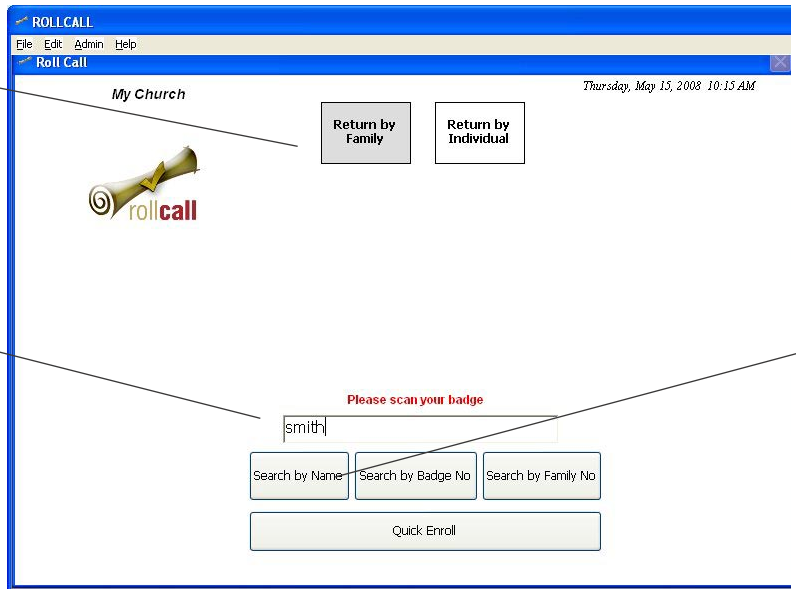


QUICK ENROLL can be used to check in visitors.

How do I check in a family using a last name, family number or badge number?

To check-in using a name, enter last name, then click SEARCH by NAME. If you want to check in by family number, enter the family number then click SEARCH by FAMILY NO. If you want to check in by badge number, enter that number then click SEARCH by BADGE NO.

Make sure the "Family" box is highlighted.



Enter the last name or part of the last name.

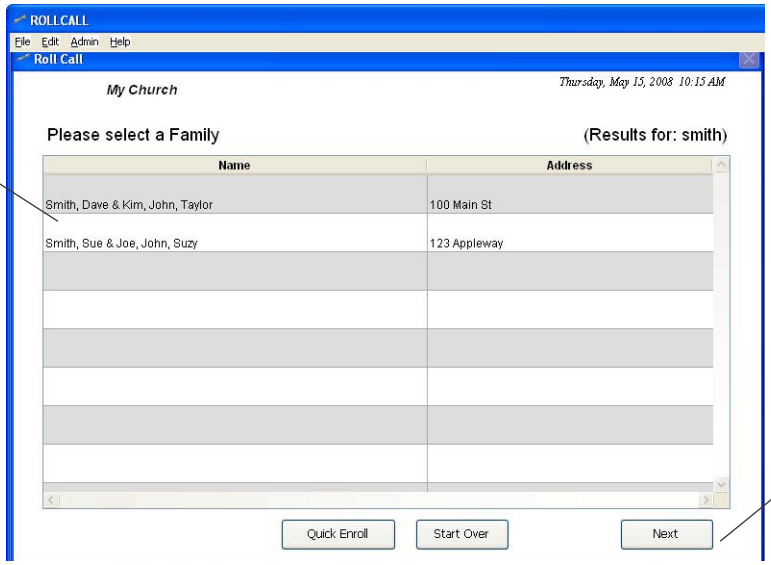
Click SEARCH BY NAME.

A list of families that met the criteria will be presented. Highlight the appropriate family and click on NEXT. Then highlight the members of the family that you'll be checking in. Next, the Automated Attendance window is displayed for the first child that was selected. This window displays the person's picture if it is available. It also lists all the groups that the person is enrolled, in that are meeting at the current time. Highlight GROUPS

the group/class you wish to check them into and click CONFIRM. Once you press confirm, attendance is recorded and labels are printed as appropriate.

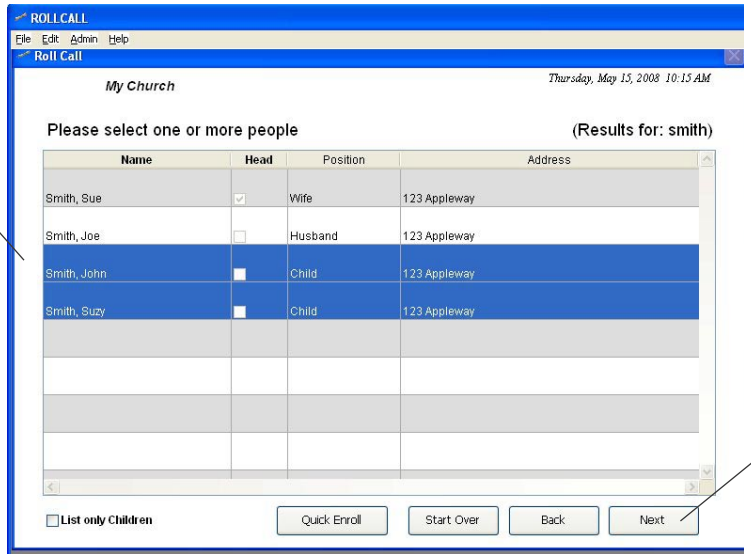
If your Roll Call preferences are set to "Auto record scanned", you will not have to press the CONFIRM button. The person will be checked into the first class on the list after so many seconds. His attendance is recorded and labels are printed as appropriate.

The families with that last name are listed here. Highlight the appropriate family.



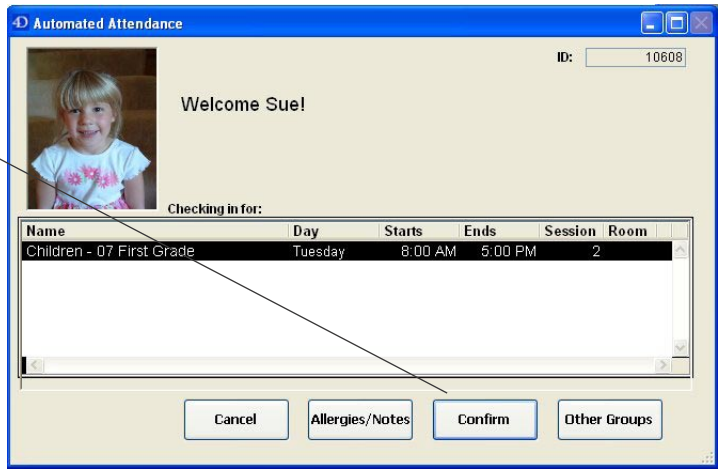
Click NEXT to continue.

Highlight the students you are checking in.



Click NEXT to continue.

Click CONFIRM to check her into this class



If the student is not enrolled in the class they wish to attend, you may press the OTHER GROUPS button, to check them into a different class. Once you press the OTHER GROUPS button, all classes that are meeting at the current time will be displayed. Highlight the one they wish to attend, and press CONFIRM

To enter one time instructions or allergy information, press the ALLERGY/NOTES button. A window will be displayed to enter this information. The allergy information will be stored in the person's record. The notes are not stored. They are meant for one-time instructions. Both pieces of information will be printed on the name tag label.

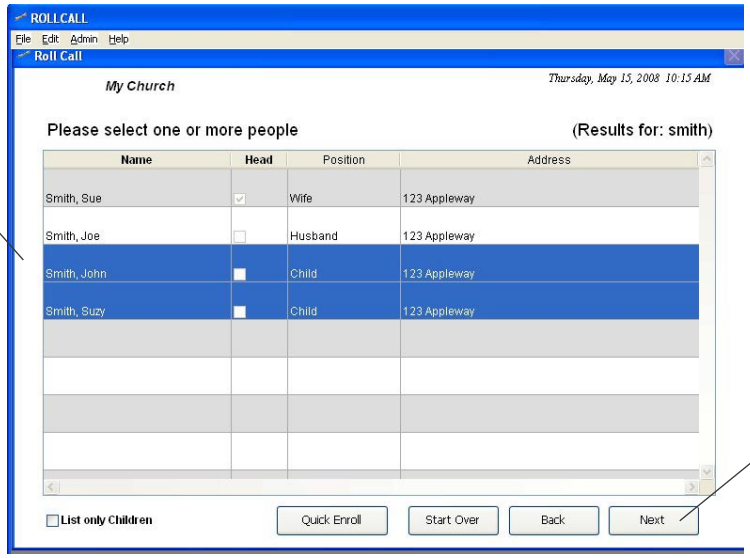
Enter allergy information

Enter special instructions or notes

How do I check a family in using a bar code?

To check a family in, make sure that the RETURN FAMILIES box is highlighted. Next scan the bar code badge, roster or key tag. A list of all the family members is returned. Highlight the students you wish to check in.

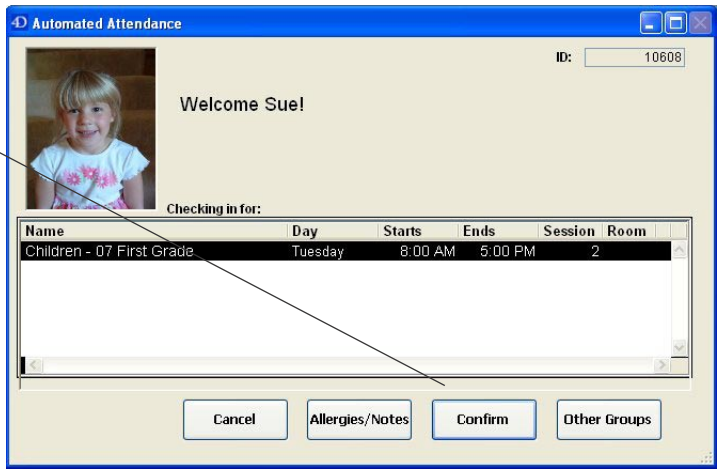
Highlight the students you are checking in.



Click NEXT to continue.

Next, the Automated Attendance window is displayed for the first child that was selected. This window displays the person's picture if it is available. It also lists all the groups that the person is enrolled, in that are meeting at the current time. Highlight the group/class you wish to check them into and click CONFIRM. Once you press confirm, attendance is recorded and labels are printed as appropriate. Then the next child's information is brought up.

Click CONFIRM to check her into this class



If your Roll Call preferences are set to "Auto record scanned", you will not have to press the CONFIRM button. The person will be checked into the first class on the list after so many seconds. His attendance is recorded and labels are printed as appropriate.

To enter one time instructions or allergy information, press the ALLERGY/NOTES button. A window will be displayed to enter this information. The allergy information will be stored in the person's record. The notes are not stored. They are meant for one-time instructions. Both pieces of information will be printed on the name tag label.

Enter allergy information

Enter special instructions or notes

How do I check in an individual using a last name or badge no?

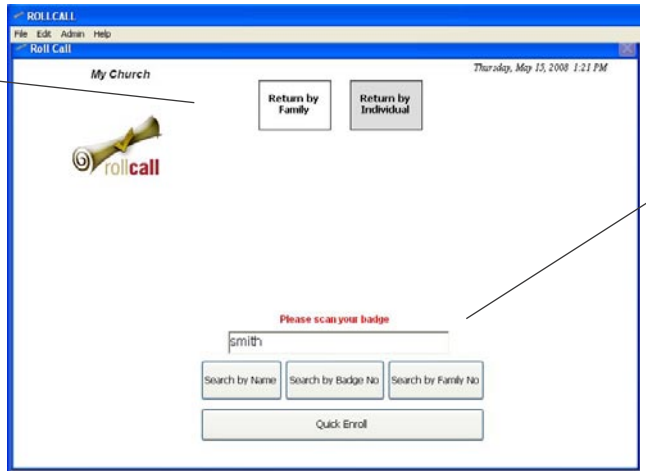
To check a specific student in, make sure that the RETURN INDIVIDUALS box is highlighted. Next Enter the last name or a portion of the last name in the field then click SEARCH BY NAME. Or, to check in by Badge No, enter that number, then click SEARCH by BADGE NO.

A list of people with that last name or badge number is displayed. Highlight the appropriate person. Click NEXT. The Automated Attendance window is displayed for this person, with their picture if it is available It also lists all the groups that the person is enrolled, in that are meeting at the current time. Highlight the group/class you wish to check them into and click CONFIRM. Once you press confirm, attendance is recorded and labels are printed as appropriate.

If your Roll Call preferences are set to "Auto record scanned", you will not have to press the CONFIRM button. The person will be checked into the first class on the list after so many seconds. His attendance is recorded and labels are printed as appropriate.

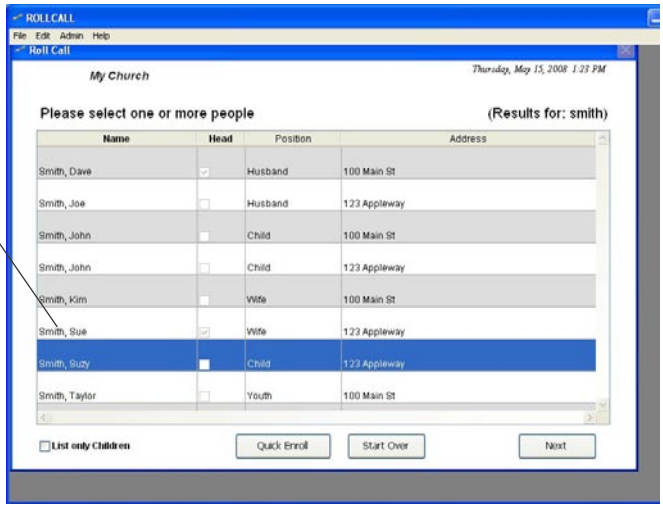
To enter one time instructions or allergy information, press the ALLERGY/NOTES button. A window will be displayed to enter this information. The allergy information will be stored in the person's record. The notes are not stored. They are meant for one-time instructions. Both pieces of information will be printed on the name tag label.

Make sure RETURN INDIVIDUALS is highlighted.

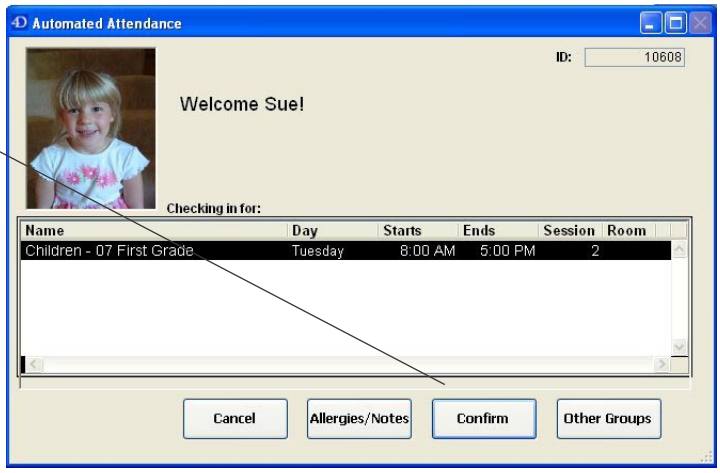


Enter last name. Then click SEARCH BY NAME.

Highlight the student you wish to check in. Click NEXT.



Click CONFIRM to check her into this class



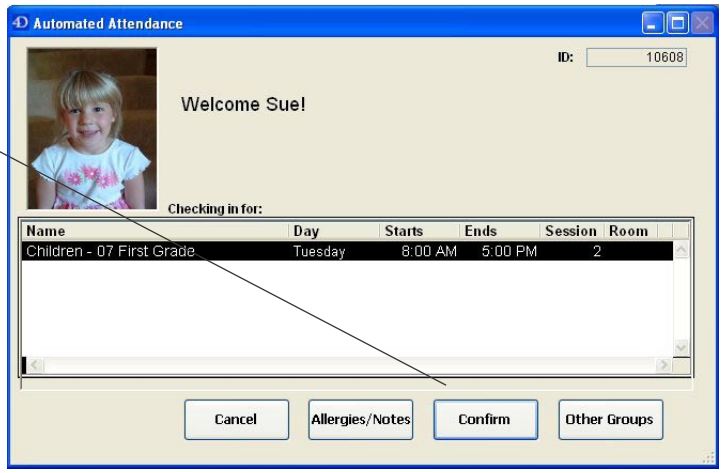
How do I check in an individual using a bar code?

To check a specific student in, make sure that the RETURN INDIVIDUALS box is highlighted. Next scan the badge, key chain tag or roster bar code for that student.

Next the Automated Attendance window is displayed for this person. It lists all the groups that the person is enrolled, in that are meeting at the current time. Highlight the group/class you wish to check them into and click CONFIRM. Once you press confirm, attendance is recorded and labels are printed as appropriate.

If your Roll Call preferences are set to "Auto record scanned", you will not have to press the CONFIRM button. The person will be checked into the first class on the list after so many seconds. His attendance is recorded and labels are printed as appropriate.

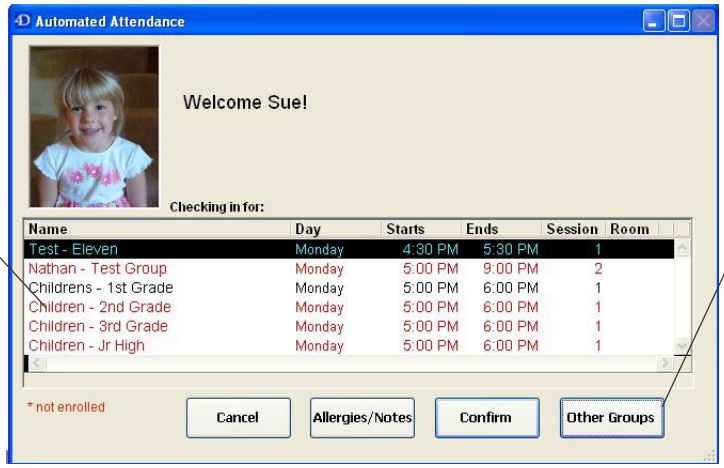
Click CONFIRM to check her into this class



How do I check in a student to a different class?

If the student is not enrolled in a class that is meeting at the current time or you want to check him into a different class, click the OTHER GROUPS button. A list of all the classes that are meeting at the current time will be displayed. Highlight the class you wish to check them into, then press CONFIRM.

Highlight the class you wish to check her into.


Automated Attendance
Welcome Sue!
Checking in for:
Name Day Starts Ends Session Room
Test - Eleven Monday 4:30 PM 5:30 PM 1
Nathan - Test Group Monday 5:00 PM 9:00 PM 2
Childrens - 1st Grade Monday 5:00 PM 6:00 PM 1
Children - 2nd Grade Monday 5:00 PM 6:00 PM 1
Children - 3rd Grade Monday 5:00 PM 6:00 PM 1
Children - Jr High Monday 5:00 PM 6:00 PM 1
* not enrolled
Cancel
Allergies/Notes
Confirm
Other Groups

Click OTHER GROUPS to view all the available classes.

How do I check-in visitors?

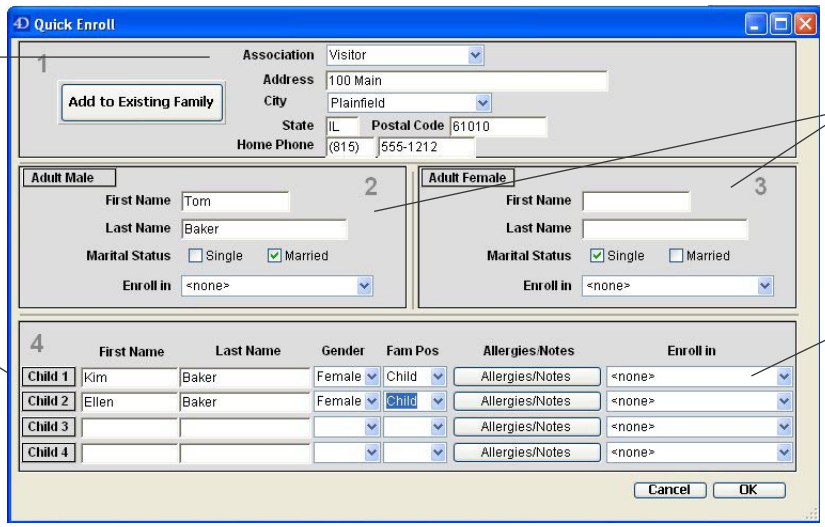
To check visitors into a class or group, click on the QUICK ENROLL button. Select an association of Visitor. Next enter the address and phone information if you'd like. Next enter the Mom and Dad's information if you'd like to capture that. In the lower section enter the children's names. You can enter up to four children through this QUICK ENROLL.

If you need to enter allergy or notes information, click on the ALLERGY/NOTES button. Enter the appropriate allergy and notes information for the child.

The drop down box will contain all the classes that are meeting at the current time. Select from this list to choose the class to check the child into.

Once you click OK the labels will be printed for each person enrolled in a class.

Enter Association. Address information is optional.

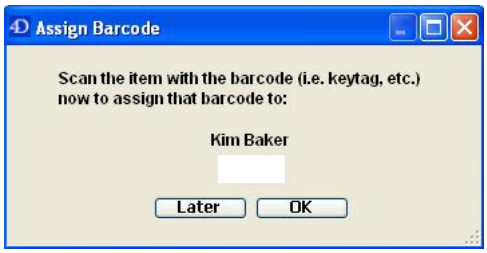


Enter mom and dad's info if you'd like.

Enter children's info.

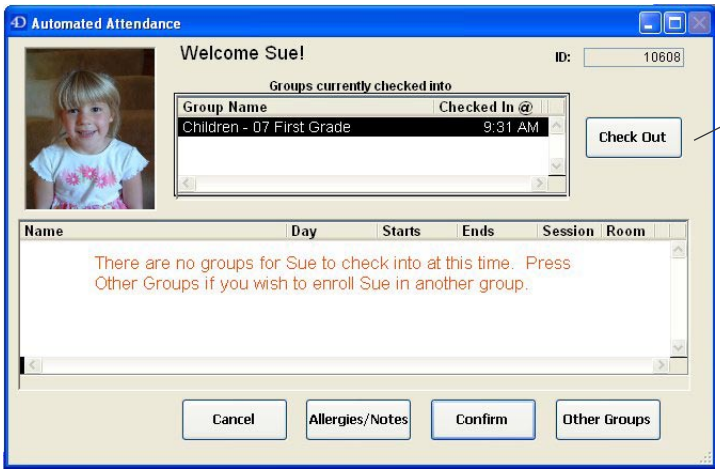
Use drop down to select class to check them into.

If you are using key chain tags and have the bar code assignment preference set to manual, the following window will be displayed after you click OK from the Quick Enroll window. If you'd like to assign this visitor a bar code number, scan the key chain tag here.



Can I record check-out times for students?

Yes. To record check-outs, use the FIND BY NAME or scan the bar code to identify the student that is checking out. Notice the area in the top of the window shows the class that the child is checked into. Click CHECK OUT to record the check out time for the student.



Click CHECK OUT to record check out time.

USING FINGERPRINTS

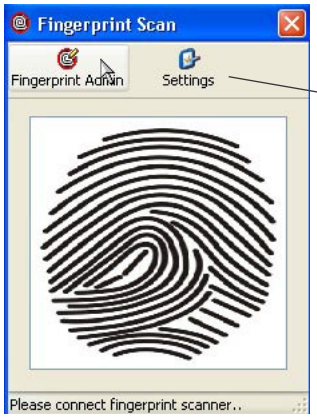
What needs to be configured to use fingerprint technology?

To identify and check children in using finger prints, you will need to install the M2SYS Server and Client software on Windows machines (Windows 2000, Windows 2000, 2003 Server or Windows XP). The installation instructions for this software can be found on your installation CD or at www.M2SYS.com.

The fingerprint scanner must be plugged into a USB port on the client machines.

How do I set up the fingerprint software so it works with Roll Call?

The first step is to set up the BioPlugin Adapter settings on each of the client machines. Double click on the BioPlugin Adapter icon. From the finger print window, click on the SETTINGS button.



Click on SETTINGS button to enter administrative information.

From the General tab, you'll need to enter the IP address and port number of the Biometric Server. This information can be found in the Control Panel under Biometric Server.

Click on General tab.

Enter IP address and Port number of the Biometric Server.

From the Interface tab, you'll need to indicate this is a Keyboard Interface.

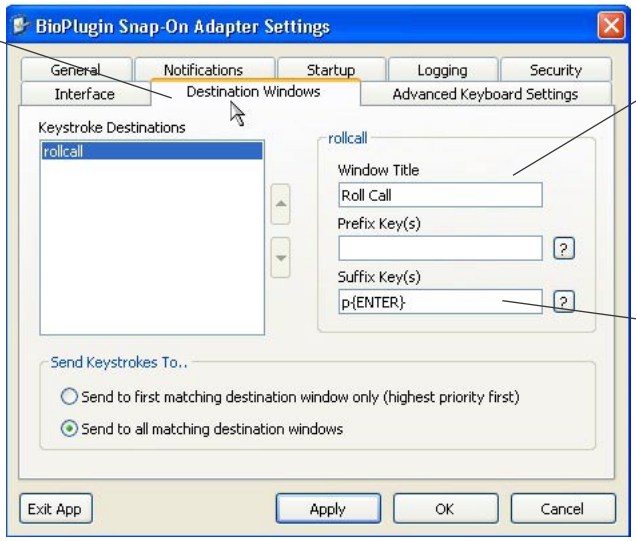
Click Interface tab.

Select Keyboard interface.

BioPlugin Snap-On Adapter Settings
General
Notifications
Startup
Logging
Security
Interface
Destination Windows
Advanced Keyboard Settings
Snap-On Interface Method
Keyboard Interface
Used to communicate with an application that requires users to type an ID, PIN number, or username and password to identify themselves.
Serial Port Interface
Used to communicate with an application that allows user identification through a serial device such as a barcode scanner or card reader.
Exit App
Apply
OK
Cancel

From the Destination Windows tab, you'll need to indicate that you are connecting to Roll Call. If you are using a single check in station, the *Window Title* is "Roll Call". If you have multiple check in stations and are using a network version of Roll Call, the *Window Title* is "ROLLCALL Client". Enter rollcall as the *Keystroke Destination*. Make sure the suffix is set to p {enter}

Click Destination Window tab.



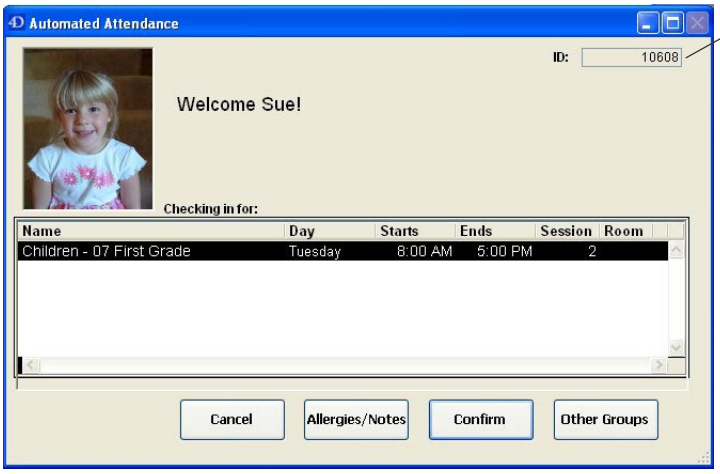
Enter Roll Call or Roll Call Client as the Window Title.

Set suffix to p{enter}.

How do I connect a person's finger print with Roll Call?

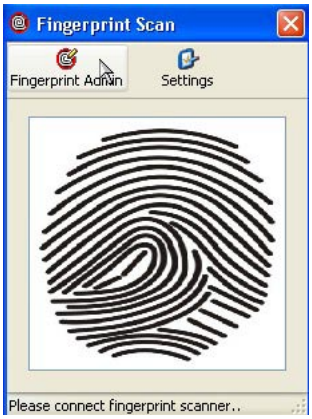
When a person arrives to check in, you'll need to first identify that person in Roll Call. Click on the FIND BY NAME button and click on the specific individual. From the Automated Attendance window, note this person's ID in the upper right corner.

Next, bring up the Biometric SnapOn Adapter. Click on the FINGERPRINT ADMINISTRATION button to enter this person's Roll Call ID and scan their fingerprint.



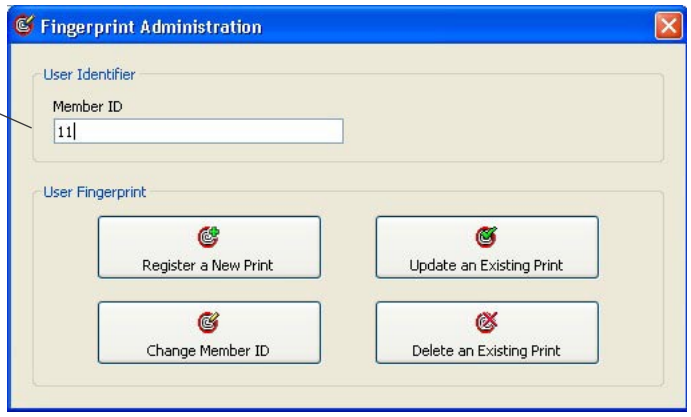
Note the ID for this person.

Click on FINGER-PRINT ADMIN to record Roll Call ID and scan finger print.

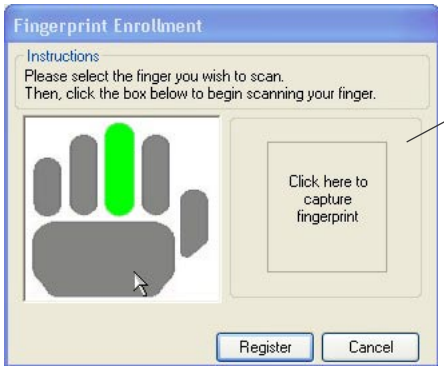


From the Fingerprint Admin window, enter the person's ID number, then click on the REGISTER A NEW PRINT button.

Enter the ID from the Roll Call checkin screen.



The next screen allows you to scan the individuals fingerprint. Make sure you set a standard for which finger and on which hand will be scanned. Click on the right side to capture the fingerprint. Have the student place their finger on the scanner. They will need to scan their print three times. A message will come up indicating a successful scan.

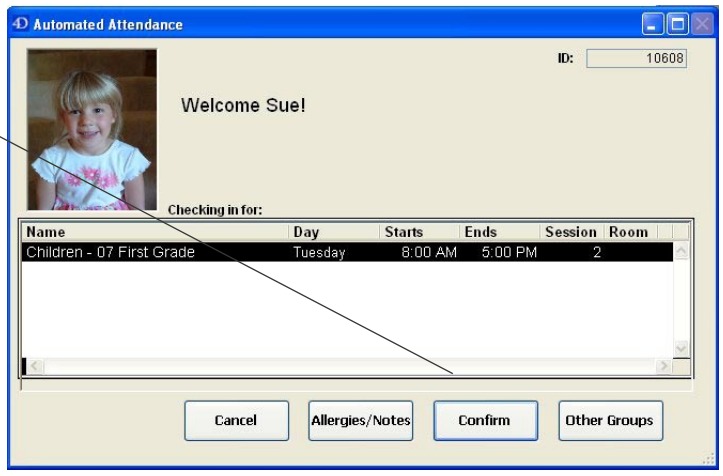

Fingerprint Enrollment
Instructions
Please select the finger you wish to scan.
Then, click the box below to begin scanning your finger.
Click here to capture fingerprint
Register
Cancel

Click to begin scanning fingerprint.

Once a person's fingerprint is recorded, how do I check them in?

From the check in screen, scan their fingerprint. The Automated Attendance window is displayed for the person identified by the fingerprint. This window displays the student's picture if it is available. It also lists all the groups that are meeting at the current time, that the person is enrolled in. Highlight the group/class you wish to check them into and click CONFIRM. Once you press confirm, attendance is recorded and labels are printed as appropriate.

Click CONFIRM to check her into this class

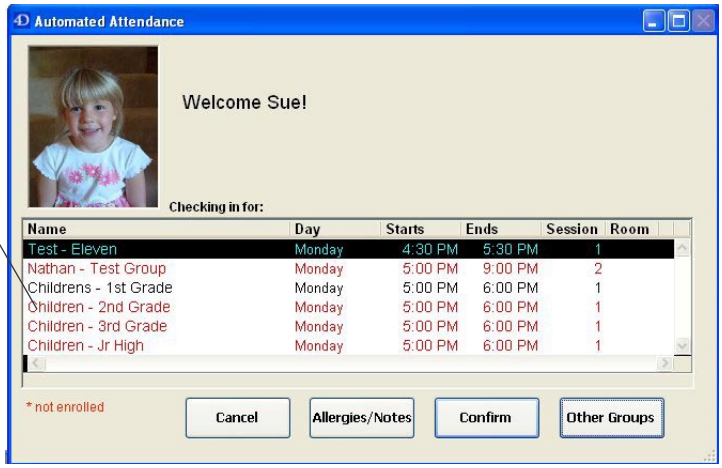


If your Roll Call preferences are set to "Auto record scanned", you will not have to press the CONFIRM button. The person will be checked into the first class on the list after so many seconds. His attendance is recorded and labels are printed as appropriate.

If the student is not enrolled in the class they wish to attend, you may press the OTHER GROUPS button, to check them into a different class. Once you press the OTHER GROUPS button, all classes that are meeting at the current time will be displayed. Highlight the one they wish to attend, and press CONFIRM.

To enter one time instructions or allergy information, press the ALLERGY/NOTES button. A window will be displayed to enter this information. The allergy information will be stored in the person's record. The notes are not stored. They are meant for one-time instructions. Both pieces of information will be printed on the name tag label.

Highlight the class you'd like to check her into.



Enter allergy information.

CREATING ATTENDANCE REPORTS

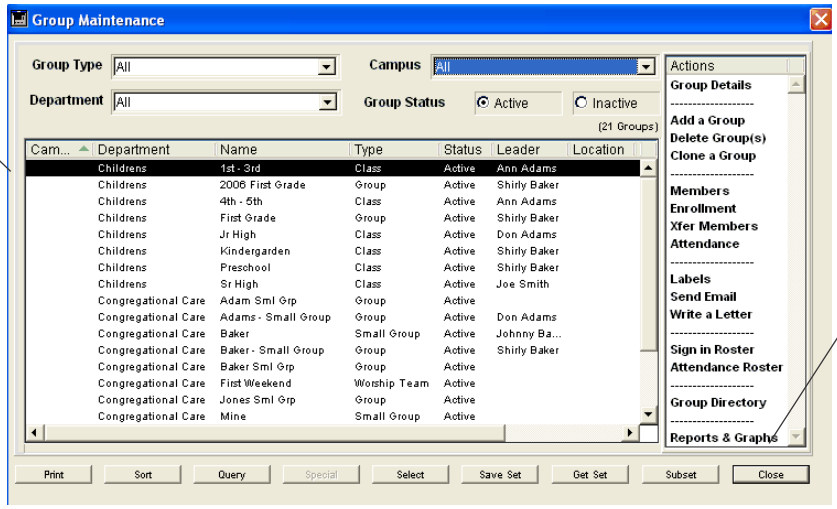
How do I run Group Attendance reports?

There are two ways to access the group attendance reports.

1. From the Group Maintenance screen.
2. From the Groups menu.

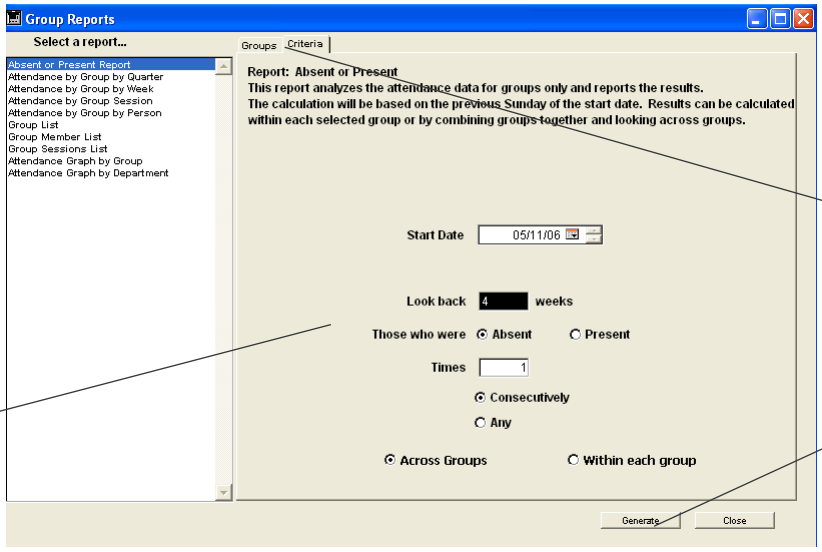
To run the reports from the Group Maintenance screen, select Groups>Group Maintenance from the main menu. Highlight the group or groups you'd like to select and press Reports & Graphs from the Action Bar. To highlight multiple groups on the Mac, hold down the CMD key and click on each group. On Windows, hold down the CTRL key and click on each group.

Once you click on Reports & Graphs, a list of group reports will be displayed. Highlight the report you'd like to run. Note the two tabs on this screen. The criteria tab is displayed so that you may select the date or date range for each of the reports you wish to run. The other tab is the group tab. This will contain the groups you selected from the Group Maintenance window. You may review or change your group selection here.



Highlight the group or groups to print the report for.

Click on Reports & Graphs.



Highlight the report you wish to run.

Note the group tab. This can be used to change group selection.

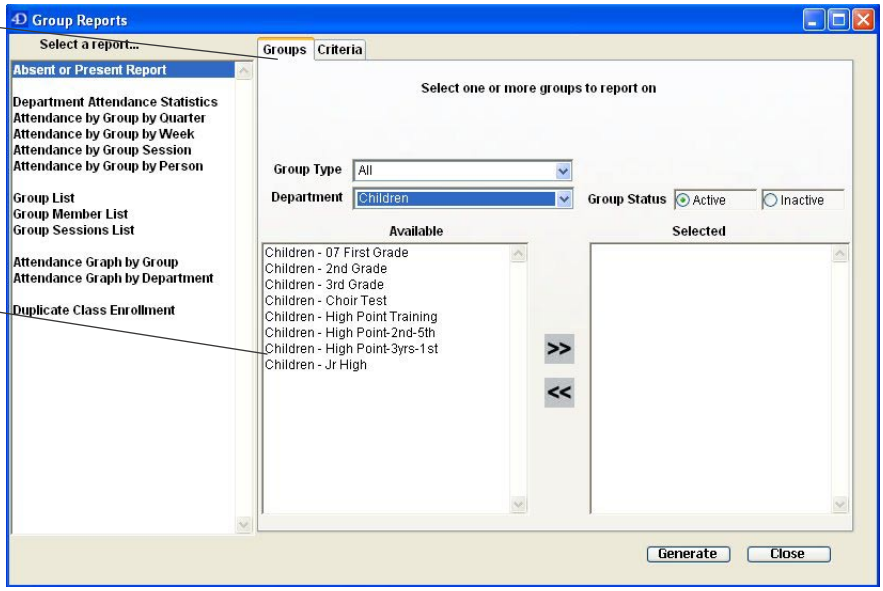
Criteria options change as you change reports.

Click to run the report.

To run the report from the Group menu, select Groups>Group Reports from the main menu. The group reports window is displayed with the groups tab displayed. Highlight the report you'd like to run. Next select the group/groups you'd like to run the reports for. Once you've made your group selection, press the criteria tab to enter your date ranges for the report.

You are in the groups tab of the Group Reports window.

Click over the groups you'd like to include in the report.



How can you tell who has been absent or present for X weeks?

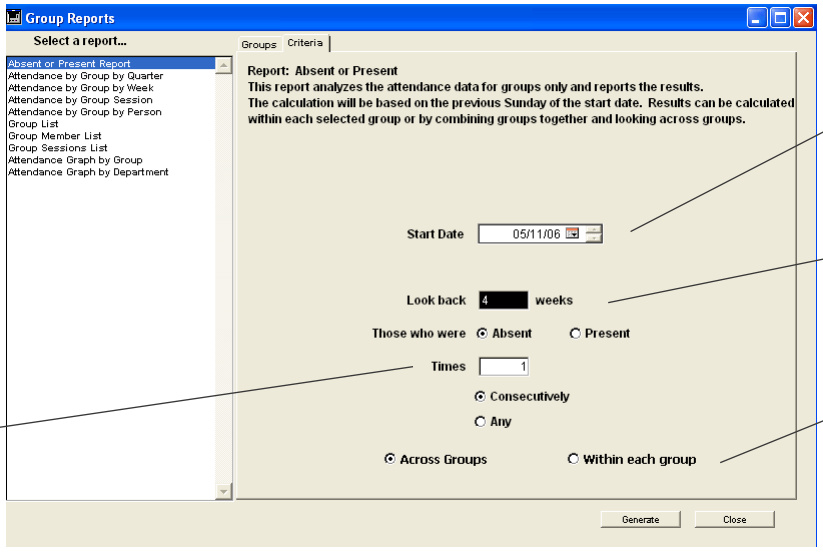
The absent/present report outlines the people that meet your absent/present criteria. This report analyzes group attendance data. It does not take into consideration worship attendance information.

To run this report, navigate to the Group Reports window. Highlight Absent or Present. If you have not made your group selection, press the group tab and highlight the groups you'd like to run this report for. Next press the criteria tab.

1. Enter the *Start Date* that will be used as the basis for this report. The calculations are based on weeks starting with the Sunday prior to the Start Date you enter. If you enter a Sunday, it will start with that date.
2. Indicate how many *Weeks* to look back.

Highlight Absent or Present.

Check if you are looking for Absent or Present and how many weeks.



Enter the starting date to consider.

Enter the number of weeks to look back.

Do you want to evaluate each group separately or as a whole.

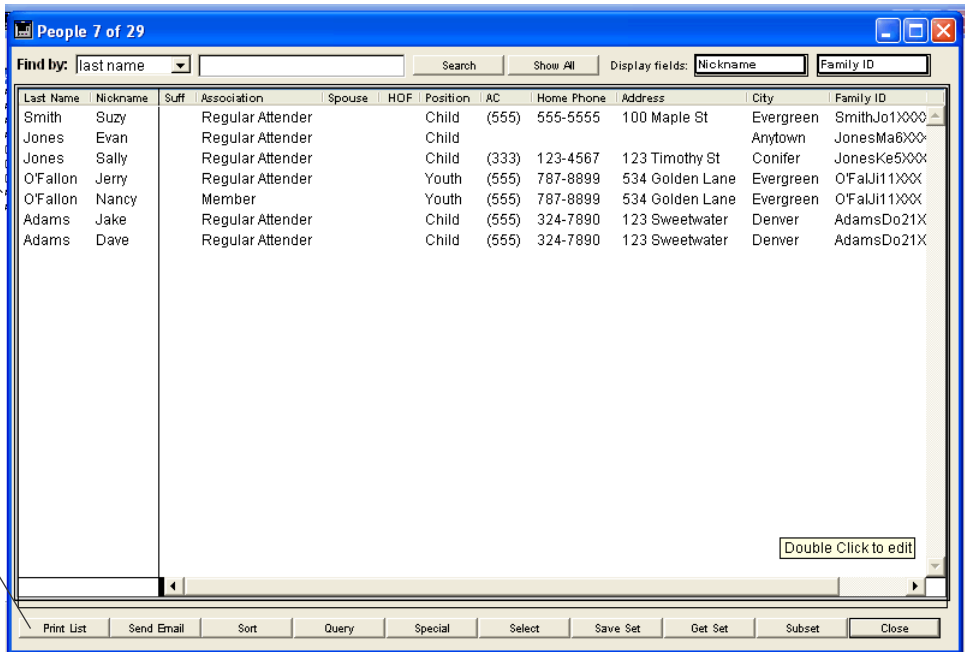
3. Indicate if you want to find people that were “Absent” or “Present”.
4. Enter the number of *Times* the person was “Absent” or “Present” during the time period.
5. Indicate if you are interested in folks who where “Absent” or “Present” that number of times in a row (“Consecutively”) or just that number of times (“Any”).
6. Mark whether you’d like the calculation to be for each group individually or across all the groups that were selected.

For this example, lets say we want to know all the children that have missed Sunday school for the last 4 weeks.

1. Select Groups>Group Reports from the main menu.
2. Highlight Absent or Present.
3. Change *Department* to Children’s.
4. Highlight all the classes.
5. Enter today’s date.
6. Indicate that we want to look back 4 weeks.
7. Mark “Absent”.
8. Mark “Consecutively”. (Either option would work here, since we are only looking back 4 weeks)
9. Enter 4 as the number of *Times*.
10. Select “Across” groups. (in this case we are just interested in their attendance for any class not a specific class)
11. Press GENERATE.

List of people that met the absent present criteria.

Note actions that can be performed for the list.

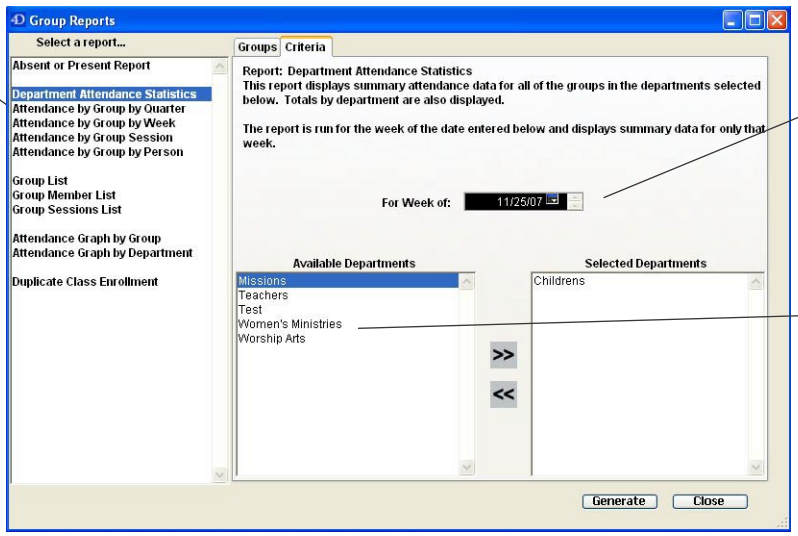

People 7 of 29
Find by: last name
Search
Show All
Display fields: Nickname
Family ID
Last Name Nickname Suff Association Spouse HOF Position AC Home Phone Address City Family ID
Smith Suzy Regular Attender Child (555) 555-5555 100 Maple St Evergreen SmithJo1XXX
Jones Evan Regular Attender Child Anytown JonesMa6XXX
Jones Sally Regular Attender Child (333) 123-4567 123 Timothy St Conifer JonesKe5XXX
O'Fallon Jerry Regular Attender Youth (555) 787-8899 534 Golden Lane Evergreen O'FalJi11XXX
O'Fallon Nancy Member Youth (555) 787-8899 534 Golden Lane Evergreen O'FalJi11XXX
Adams Jake Regular Attender Child (555) 324-7890 123 Sweetwater Denver AdamsDo21X
Adams Dave Regular Attender Child (555) 324-7890 123 Sweetwater Denver AdamsDo21X
Double Click to edit
Print List
Send Email
Sort
Query
Special
Select
Save Set
Get Set
Subset
Close

From the results window you may choose to PRINT, SAVE SET, EMAIL these folks or CLOSE the window.

Can I see the attendance stats for each group/class in a department?

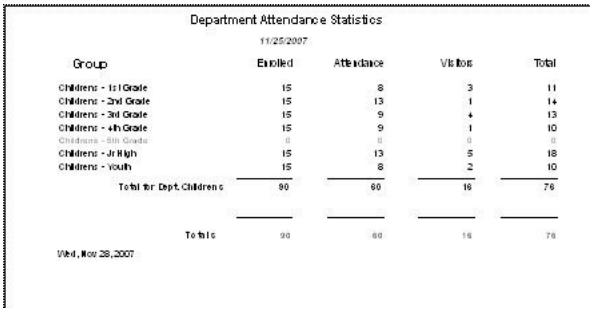
To see the attendance statistics for a department for a given date, navigate to the Group Reports window. Highlight the Department Attendance Statistics report. Select the Departments you'd like to see. Enter the Date. Press GENERATE.

Highlight Department Statistics.



Enter date.

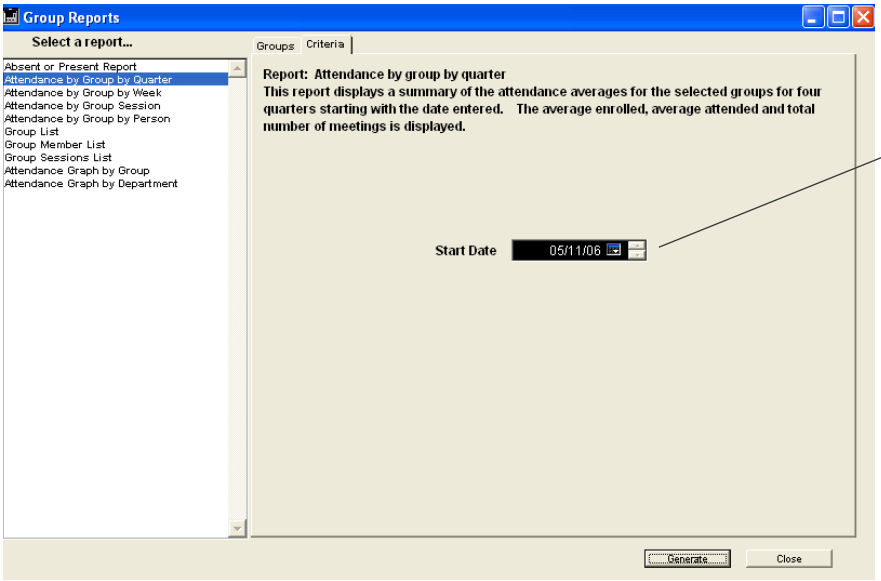
Click to select the departments.


Department Attendance Statistics
11/25/2007
Group
Enrolled
Attendance
Visitors
Total
Childrens - 1st Grade 15 8 3 11
Childrens - 2nd Grade 15 13 1 14
Childrens - 3rd Grade 15 9 4 13
Childrens - 4th Grade 15 9 1 10
Childrens - Jr High 15 13 5 18
Childrens - Youth 15 8 2 10
Total for Dept. Childrens 90 60 16 76
Totals 90 60 16 76
Wed, Nov 28, 2007

Can I see the attendance stats for groups for a quarter?

To view the average enrolled, average attended and the total number of meetings for the groups selected, select the Attendance by Quarter report. The information is calculated based on four quarters starting with the date you enter as the criteria date.

Highlight Attendance by Quarter.


Group Reports
Select a report...
Absent or Present Report
Attendance by Group by Quarter
Attendance by Group by Week
Attendance by Group Session
Attendance by Group by Person
Group List
Group Member List
Group Sessions List
Attendance Graph by Group
Attendance Graph by Department
Groups
Criteria
Report: Attendance by group by quarter
This report displays a summary of the attendance averages for the selected groups for four quarters starting with the date entered. The average enrolled, average attended and total number of meetings is displayed.
Start Date
05/11/06
Generate
Close

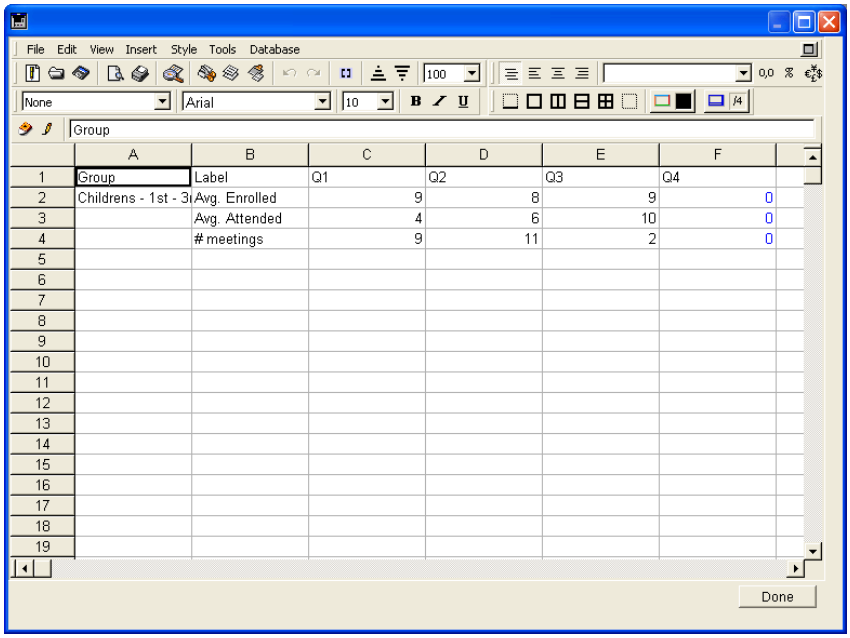
Enter starting date of the first quarter.

To run this report, navigate to the Group Reports window. Highlight Attendance by Group by Quarter. If you have not made your group selection, press the group tab and highlight the groups you'd like to consider in this report. Next press the criteria tab. Enter the starting date for the 1st quarter.

As an example, lets say we need attendance averages for our Sunday school classes for the last year.

1. Select Group>Group Maintenance from the main menu.
2. Change the *Department* to Children's.
3. Highlight the Sunday school classes.

Note menu and icons to perform standard spreadsheet functions.



	A	B	C	D	E	F
1	Group	Label	Q1	Q2	Q3	Q4
2	Childrens - 1st - 3(	Avg. Enrolled	9	8	9	0
3		Avg. Attended	4	6	10	0
4		# meetings	9	11	2	0

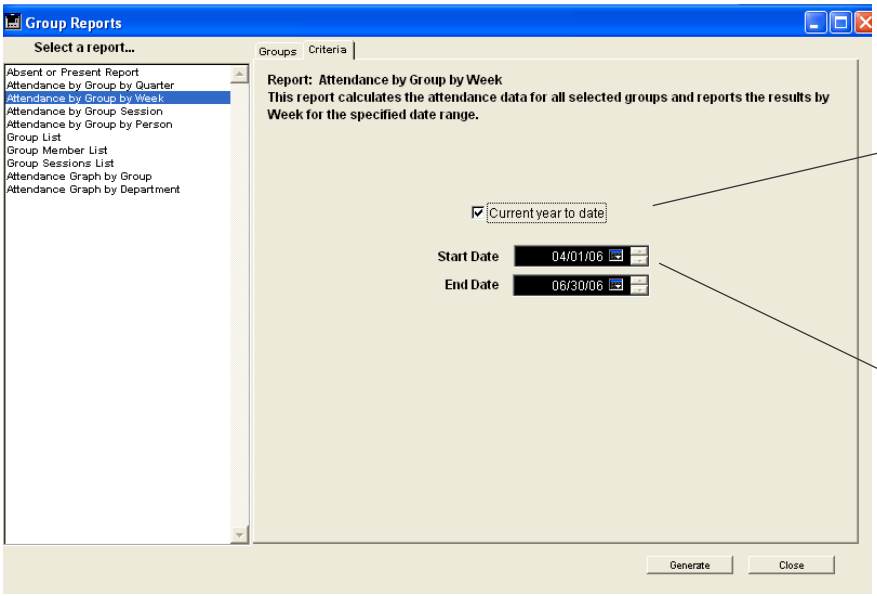
4. Press Group Reports & Graphs from the Action bar.
5. From the Group Reports window, highlight Attendance by Group by Quarter.
6. Enter 6/1/05 as the Start Date. The quarters would be 6/1/05 – 8/31/05; 9/1/05 – 11/30/05; 12/1/05 – 2/28/06; 3/1/06 – 5/31/06.
7. Press GENERATE.

The results are displayed in 4D's spreadsheet. To print the spreadsheet select File>Print from the spreadsheet menu. To save the information select File>Save from the spreadsheet menu.

Can I view attendance for a group by week?

This report lists the attendance information for each group for each week within the date range criteria. If there are multiple sessions defined for the group, the attendance is rolled up and summarized for the group for all sessions that met during the week. For each week the number of enrolled, the number of visitors and the number present are listed.

To run this report, navigate to the Group Reports window. Highlight Attendance by Group by Week. If you have not made your group selection, press the group tab and highlight the groups you'd like to run this report for. Next press the criteria tab. Enter the date range for the report.



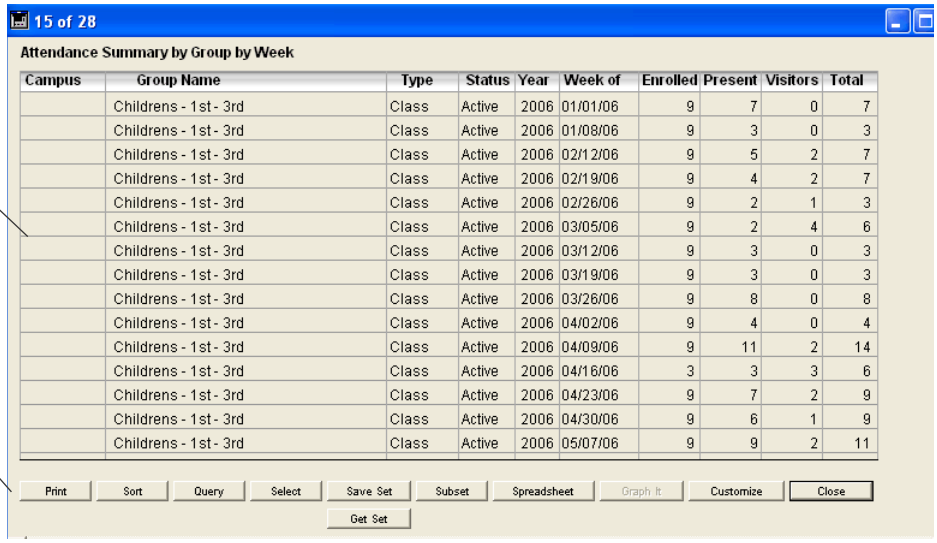
Highlight Attendance by Group by Week.

Mark if you'd like to see Year to Date information.

Enter the date range you'd like. Make sure Current Year to Date is unchecked.

As an example, lets say we want to see the attendance information for our Children's classes since the beginning of the year.

1. Select Group>Group Maintenance from the main menu.
2. Change the *Department* to Children's.
3. Highlight the Sunday school classes.
4. Press Group Reports & Graphs from the Action bar.


15 of 28
Attendance Summary by Group by Week
Campus | Group Name | Type | Status | Year | Week of | Enrolled | Present | Visitors | Total
Childrens - 1st - 3rd | Class | Active | 2006 | 01/01/06 | 9 | 7 | 0 | 7
Childrens - 1st - 3rd | Class | Active | 2006 | 01/08/06 | 9 | 3 | 0 | 3
Childrens - 1st - 3rd | Class | Active | 2006 | 02/12/06 | 9 | 5 | 2 | 7
Childrens - 1st - 3rd | Class | Active | 2006 | 02/19/06 | 9 | 4 | 2 | 7
Childrens - 1st - 3rd | Class | Active | 2006 | 02/26/06 | 9 | 2 | 1 | 3
Childrens - 1st - 3rd | Class | Active | 2006 | 03/05/06 | 9 | 2 | 4 | 6
Childrens - 1st - 3rd | Class | Active | 2006 | 03/12/06 | 9 | 3 | 0 | 3
Childrens - 1st - 3rd | Class | Active | 2006 | 03/19/06 | 9 | 3 | 0 | 3
Childrens - 1st - 3rd | Class | Active | 2006 | 03/26/06 | 9 | 8 | 0 | 8
Childrens - 1st - 3rd | Class | Active | 2006 | 04/02/06 | 9 | 4 | 0 | 4
Childrens - 1st - 3rd | Class | Active | 2006 | 04/09/06 | 9 | 11 | 2 | 14
Childrens - 1st - 3rd | Class | Active | 2006 | 04/16/06 | 3 | 3 | 3 | 6
Childrens - 1st - 3rd | Class | Active | 2006 | 04/23/06 | 9 | 7 | 2 | 9
Childrens - 1st - 3rd | Class | Active | 2006 | 04/30/06 | 9 | 6 | 1 | 9
Childrens - 1st - 3rd | Class | Active | 2006 | 05/07/06 | 9 | 9 | 2 | 11
Print
Sort
Query
Select
Save Set
Subset
Spreadsheet
Graph It
Customize
Close
Get Set

Listing of attendance figures for the group for a week.

Note actions that may be performed.

5. From the Group Reports window, highlight Attendance by Group by Week.
6. Mark the box for *Current Year to Date* or enter the *Start Date* 1/1/06 and the *End Date* as today's date. If you do not want the current year to day, uncheck that box and enter the appropriate start and end dates.
7. Press GENERATE.

From the results window, you have several options:

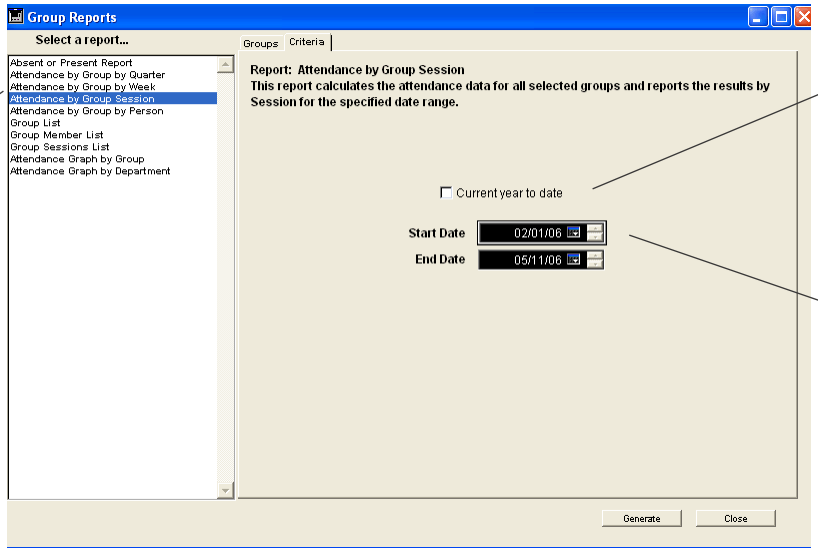
1. To print the results press PRINT. A print dialog box will be displayed so you may send the report to the printer.
2. If you would like to see the results in a different order, press SORT. The Sort Order

left. Press the green arrow in the middle, to move the field to the sort order box on the right. Click on ORDER BY to see the results sorted by your criteria.

3. If you would like to save the results of this report in a SET to use later, press SAVE SET. A file dialog box will be displayed for you to enter the name and location to save the SET file.
4. If you would like to reduce the rows displayed in the results window, highlight each row you'd like to keep. Next click on the SUBSET button. Every row that was highlighted will remain in the report.
5. If you would like to see the results displayed in 4D's spreadsheet, click SPREADSHEET. From the spreadsheet you can perform other calculations, print and save the file.
6. If you would like to see other information on the report, press the CUSTOMIZE button. You are taken to the Quick Report Editor. .

Can I view attendance information by the specific session?

The Attendance by Group Session report lists the attendance information for each group by session for each week within the date range criteria. For each session the number of enrolled, the number of visitors and the number present are listed.



Highlight the report you wish to run.

Check if you want to run the report for Year to Date information.

Enter the date range you want, if you do not want Year to Date. Make sure Year to Date is unchecked.

To run this report, navigate to the Group Reports window. Highlight Attendance by Group Session. If you have not made your group selection, press the group tab and highlight the groups you'd like to run this report for. Next press the criteria tab. Enter the date range for the report. If you'd like to see the report for the *Current Year to Date*, check that box. If you'd like a different date range, enter the S*tarting* and *Ending Dates*.

As an example, lets say we want to see the attendance information for our Children's classes from 2/1/06 – 5/11/06

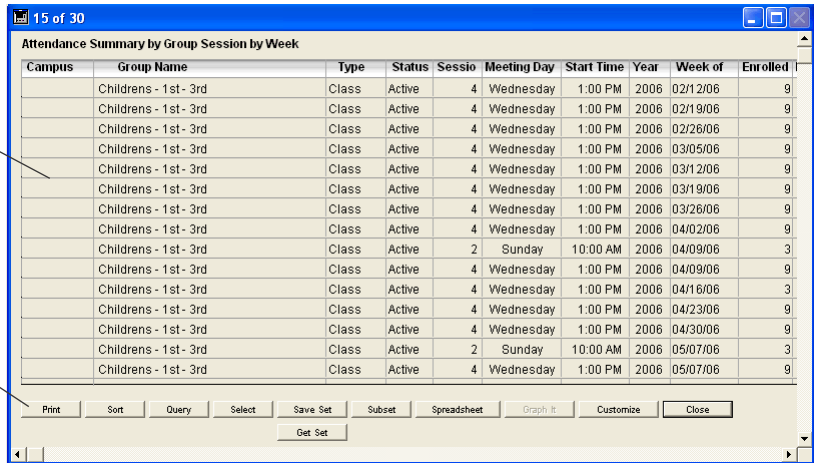
1. Select Group>Group Maintenance from the main menu.
2. Change the *Department* to Children's.
3. Highlight the Sunday school classes.
4. Press Group Reports & Graphs from the Action bar.
5. From the Group Reports window, highlight Attendance by Group Session.
6. Enter the *Start Date* 2/1/06 and the *End Date* as 5/11/06.
7. Press GENERATE.

From the results window, you have several options:

1. To print the results, press PRINT. A print dialog box will be displayed so you may send the report to the printer.
2. If you would like to see the results in a different order, press SORT. The Sort Order window will be displayed. Click on the field you'd like to sort on from the list on the left. Press the green arrow in the middle to move the field to the sort order box on the right. Click on ORDER BY to see the results sorted by your criteria.
3. If you would like to save the results of this report in a SET to use later, press SAVE SET. A file dialog box will be displayed for you to enter the name and location to save the SET file.
4. If you would like to reduce the rows displayed in the results window, highlight each row you'd like to keep. Next click on the SUBSET button. Every row that was highlighted will remain in the report.
5. If you would like to see the results displayed in 4D's spreadsheet, click

Lists the specific session attendance for each group selected.

Note actions that may be performed on the report.

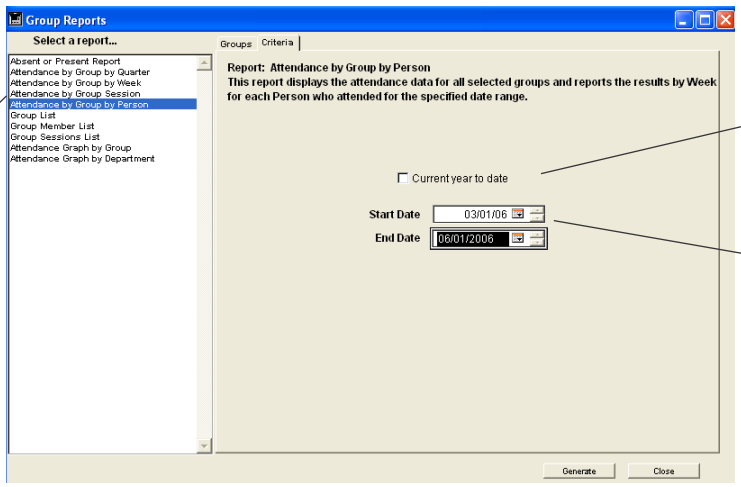

15 of 30
Attendance Summary by Group Session by Week
Campus | Group Name | Type | Status | Sessio | Meeting Day | Start Time | Year | Week of | Enrolled
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 02/12/06 | 9
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 02/19/06 | 9
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 02/26/06 | 9
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 03/05/06 | 9
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 03/12/06 | 9
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 03/19/06 | 9
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 03/26/06 | 9
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 04/02/06 | 9
Childrens - 1st - 3rd | Class | Active | 2 | Sunday | 10:00 AM | 2006 | 04/09/06 | 3
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 04/09/06 | 9
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 04/16/06 | 3
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 04/23/06 | 9
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 04/30/06 | 9
Childrens - 1st - 3rd | Class | Active | 2 | Sunday | 10:00 AM | 2006 | 05/07/06 | 3
Childrens - 1st - 3rd | Class | Active | 4 | Wednesday | 1:00 PM | 2006 | 05/07/06 | 9
Print
Sort
Query
Select
Save Set
Subset
Spreadsheet
Graph It
Customize
Close
Get Set

SPREADSHEET. From the spreadsheet you can perform other calculations, print and save the file.

6. If you would like to see other information on the report, press the CUSTOMIZE button. You are taken to the Quick Report Editor.

Can I see the people that attended group/class in a date range?

To view the People that attended a class for a date, run the Attendance by Group by Person report.


Group Reports
Select a report...
Groups
Criteria
Absent or Present Report
Attendance by Group by Quarter
Attendance by Group by Week
Attendance by Group Session
Attendance by Group by Person
Group List
Group Member List
Group Sessions List
Attendance Graph by Group
Attendance Graph by Department
Report: Attendance by Group by Person
This report displays the attendance data for all selected groups and reports the results by Week for each Person who attended for the specified date range.
Current year to date
Start Date 03/01/06
End Date 06/01/2006
Generate
Close

Highlight the report you'd like to run.

Check if you'd like to run the report for Current Year to Date.

Enter date range criteria, if you don't want Year to Date.

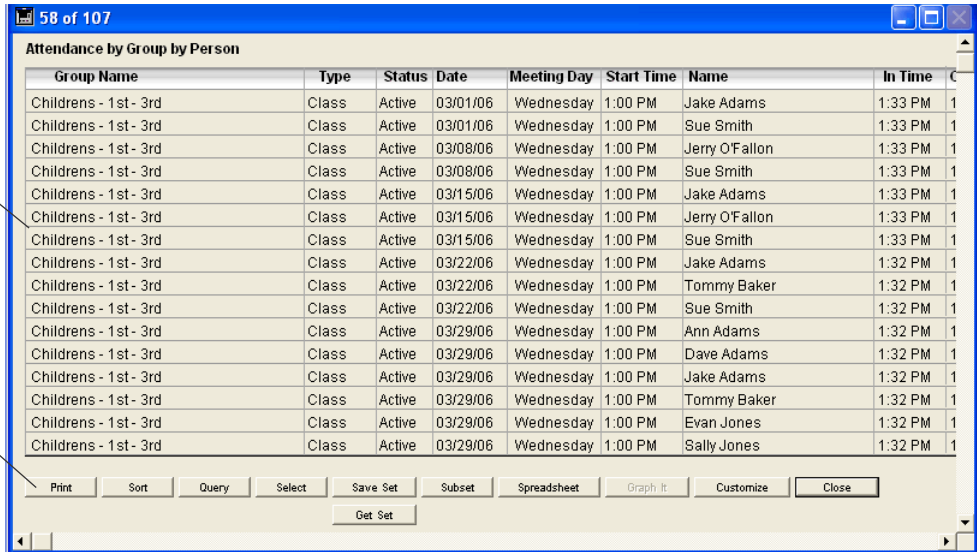
To run this report, navigate to the Group Reports window. Highlight Attendance by Group by Person. If you have not made your group selection, press the group tab and highlight the groups you'd like to run this report for. Next press the criteria tab. Enter the date range for the report. If you'd like to see the report for the *Current Year to Date*, check that box. If you'd like a different date range, enter the S*tarting* and *Ending Dates*.

As an example, lets say we want to see the attendance information for our Children's classes from 3/1/06 – 6/1/06.

1. Select Group>Group Maintenance from the main menu.

Each person who attended each group is listed.

Note actions that may be performed on the report.


58 of 107
Attendance by Group by Person
Group Name | Type | Status | Date | Meeting Day | Start Time | Name | In Time
Childrens - 1st - 3rd | Class | Active | 03/01/06 | Wednesday | 1:00 PM | Jake Adams | 1:33 PM
Childrens - 1st - 3rd | Class | Active | 03/01/06 | Wednesday | 1:00 PM | Sue Smith | 1:33 PM
Childrens - 1st - 3rd | Class | Active | 03/08/06 | Wednesday | 1:00 PM | Jerry O'Fallon | 1:33 PM
Childrens - 1st - 3rd | Class | Active | 03/08/06 | Wednesday | 1:00 PM | Sue Smith | 1:33 PM
Childrens - 1st - 3rd | Class | Active | 03/15/06 | Wednesday | 1:00 PM | Jake Adams | 1:33 PM
Childrens - 1st - 3rd | Class | Active | 03/15/06 | Wednesday | 1:00 PM | Jerry O'Fallon | 1:33 PM
Childrens - 1st - 3rd | Class | Active | 03/15/06 | Wednesday | 1:00 PM | Sue Smith | 1:33 PM
Childrens - 1st - 3rd | Class | Active | 03/22/06 | Wednesday | 1:00 PM | Jake Adams | 1:32 PM
Childrens - 1st - 3rd | Class | Active | 03/22/06 | Wednesday | 1:00 PM | Tommy Baker | 1:32 PM
Childrens - 1st - 3rd | Class | Active | 03/22/06 | Wednesday | 1:00 PM | Sue Smith | 1:32 PM
Childrens - 1st - 3rd | Class | Active | 03/29/06 | Wednesday | 1:00 PM | Ann Adams | 1:32 PM
Childrens - 1st - 3rd | Class | Active | 03/29/06 | Wednesday | 1:00 PM | Dave Adams | 1:32 PM
Childrens - 1st - 3rd | Class | Active | 03/29/06 | Wednesday | 1:00 PM | Jake Adams | 1:32 PM
Childrens - 1st - 3rd | Class | Active | 03/29/06 | Wednesday | 1:00 PM | Tommy Baker | 1:32 PM
Childrens - 1st - 3rd | Class | Active | 03/29/06 | Wednesday | 1:00 PM | Evan Jones | 1:32 PM
Childrens - 1st - 3rd | Class | Active | 03/29/06 | Wednesday | 1:00 PM | Sally Jones | 1:32 PM
Print
Sort
Query
Select
Save Set
Subset
Spreadsheet
Graph It
Customize
Close
Get Set

2. Change the *Department* to Children's.
3. Highlight the Sunday school classes.
4. Press Group Reports & Graphs from the Action bar.
5. From the Group Reports window, highlight Attendance by Group Session.
6. Enter the *Start Date* 3/1/06 and the *End Date* as 6/1/06.
7. Press GENERATE.

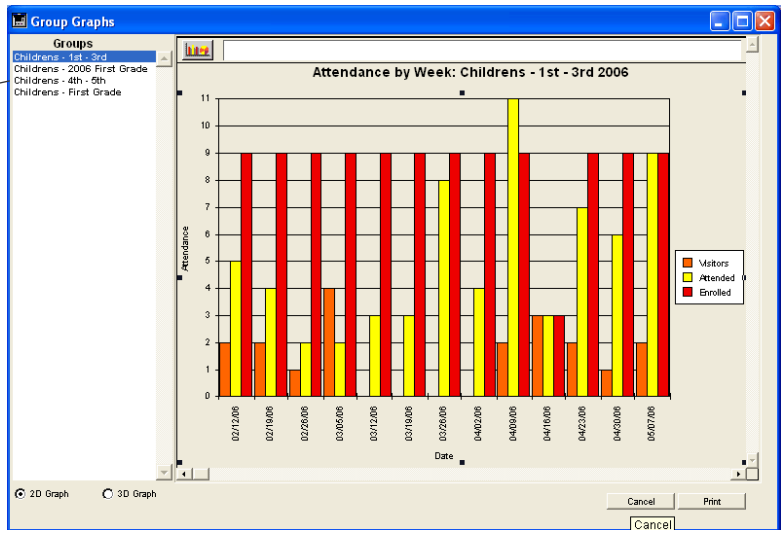
From the results window, you have several options:

1. To print the results press PRINT. A print dialog box will be displayed so you may send the report to the printer.
2. If you would like to see the results in a different order, press SORT. The Sort Order window will be displayed. Click on the field you'd like to sort on from the list on the left. Press the green arrow in the middle to move the field to the sort order box on the right. Click on ORDER BY to see the results sorted by your criteria.
3. If you would like to save the results of this report in a SET to use later, press SAVE SET. A file dialog box will be displayed for you to enter the name and location to save the SET file.
4. If you would like to reduce the rows displayed in the results window, highlight each row you'd like to keep. Next click on the SUBSET button. Every row that was highlighted will remain in the report.
5. If you would like to see the results displayed in 4D's spreadsheet, click SPREADSHEET. From the spreadsheet you can perform other calculations, print and save the file.
6. If you would like to see other information on the report, press the CUSTOMIZE button. You are taken to the Quick Report Editor.

Can I view a chart of a group's attendance for the last quarter?

To view the group attendance in a bar chart, run the Attendance Graph by Group report. To run this report, navigate to the Group Reports window. Highlight Attendance Graph by Week. If you have not made your group selection, press the group tab and highlight the groups you'd like to run this report for. Press GENERATE. The results window is displayed. Click on each group to view their results. Click PRINT to send the graph to the printer.

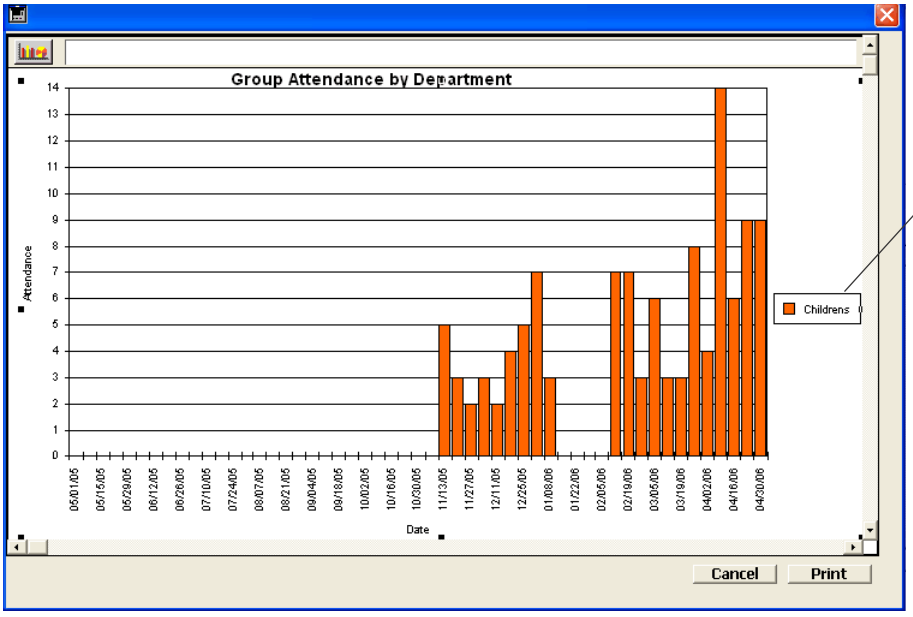
Note groups that were selected. Highlight the group to see the graph.



Can I view a chart of a department attendance the last quarter?

To view the department's attendance in a bar char, run the Attendance Graph by Department. This bar chart summarizes attendance information for each department of the groups selected.

To run this report, navigate to the Group Reports window. Highlight Attendance Graph by Department. If you have not made your group selection, press the group tab and highlight the groups you'd like to run this report for. Press GENERATE. The results window is displayed. Click on each group to view their results. Click PRINT to send the graph to the printer.



Depart-ments selected are displayed on legend.